TOURISM OPPORTUNITY STUDY FOR THE QUESNEL FOREST DISTRICT

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Ministry of Small Business, Tourism and Culture

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TOURISM OPPORTUNITY STUDY
FOR THE
QUESNEL FOREST DISTRICT

EXECUTIVE SUMMARY

INTRODUCTION AND PURPOSE

The Ministry of Small Business, Tourism and Culture (MSBTC) sponsored a Tourism Opportunities Study (TOS) for the Quesnel Forest District. The intent of this study was to identify tourism opportunities and prepare a report that can be used as a planning tool for the expansion of existing, and development of new, tourism businesses. The study encompasses ecotourism and adventure tourism opportunities within the forest district, focusing particularly on Crown land.

Tourism Opportunity Studies are defined as information tools that can be used to identify and develop tourism development opportunities. The study is intended to be a tool for existing and potential operators, government planners, and local communities. The TOS is intended to:

- Identify adventure tourism markets, trends and product development demands
- Provide an analysis of local characteristics, and land and resource management issues that could affect adventure tourism development
- Identify those adventure tourism products and activities which the region has the best opportunity to develop
- Provide an adventure tourism product development action plan for parties interested in developing the region's related opportunities

OVERVIEW OF THE NORTH CARIBOO

The study area for this project is the Quesnel Forest District. This region encompasses 210,000 square kilometers located in central British Columbia. The region stretches from the headwaters of the Blackwater (West Road) River in the west to Bowron Lake Provincial Park in the east. The northern border is the confluence of the West Road River and the Fraser River while the southern border is around the communities of Marguerite and Tingley Creek.

The Quesnel Forest District is almost entirely comprised of portions of the Interior Plateau, accompanied by a small section of the Columbia Mountains in the extreme eastern portions of the district. Within the district, the Interior Plateau is represented by three subdivisions, the Fraser Basin, the Fraser Plateau and the Quesnel Highland. To distinguish it from the larger Cariboo region, and from the City of Quesnel, the study area has been referred to in this report as the North Cariboo.

The study area is heavily based on forestry, but also has a strong service and retail trade sector. Forestry is reported to account for about two-thirds of economic activity in the region (direct and indirect), and officially accounts for about 30% direct of employment. This is a very large proportion of jobs concentrated in the forest sector, which is about three times higher than the provincial average.

The drivers of the economy are expected to continue to be forestry (including increased reliance on value-added activity), tourism, and the service industries. There is also expected to be growth in agriculture, high technology, education and the retirement sector. However, the economy and population of the area is expected to exhibit the slow growth trends of the recent past.

Tourism has good potential for growth – both from pass-through and destination markets. Growth is anticipated in urban tourism based on continued improvements in downtown Quesnel. Rural tourism growth is anticipated based on expansion of the adventure tourism and culture sectors.

Adventure tourism development is best suited for the soft adventure market. This niche has been targeted as the region's resources tend to be of regional/provincial significance, as opposed to national or international significance typically required for the hard or avid adventure market.

ADVENTURE TOURISM AND LAND USE PLANNING

The Cariboo-Chilcotin Land Use Plan outlines a strategy for tourism development in the region. This information sets the direction that the Ministry of Forests intends to follow in land management issues affecting tourism development. The following are the key guidelines to the tourism industry intended to allow land use decisions to include favourable consideration of tourism. (Source: Cariboo-Chilcotin Land Use Plan – Tourism Sector Strategy. P. 139)

- Maintain the current diversified tourism product in the region in terms of front, mid and backcountry products
- Locate new facilities in Protected Areas (PA) or Special Resource Development Zones (SRDZ) if they depend on unaltered or natural appearing settings
- Locate tourism facilities to face PAs to ensure maintenance of the dominant viewscape
- Integrate tourism uses with recreation, fish and wildlife, and cultural heritage uses
- Concentrate tourism uses in areas that allow for management of tourism values
- Consider activities that do not have constraining resource needs such as urban products, cultural activities, and motorized off-road activities
- Native and non-native culture offer significant opportunity for tourism and the resources on which this product depend should be identified and maintained

A tourism land use policy has been developed and reported in the Appendix to the Land Use Plan. The introduction to the policy states the following: *"Tourism is a significant and growing land use component in the Cariboo-Chilcotin and contributes to the region's quality of life. It plays a key role in diversifying the resource-based economy of the region. Tourism relies on secure access to, and sustainability of, a variety of high quality natural environments, resources and experiences."*

The Land Use Goal states the following: *"To encourage land use and resource management decisions that protect and manage the natural environment, high value tourism resources and cultural values on which tourism depends"*.

ANALYSIS OF THE NORTH CARIBOO TOURISM INDUSTRY

The analysis of facilities indicates that the region has a reasonable base of tourism accommodation but a much smaller inventory of attractions. This is significant as it is indicative of the composition of the region's tourism industry. That is, travellers can be accommodated adequately, but outside of Barkerville, there are few attractions to encourage people to either visit or stay in the region.

In terms of accommodation the region has a mix of types. Although there has been one recent hotel development in Quesnel and at least two significant upgrades, most of the accommodation properties are older and of modest quality. They have been suitable for the historic commercial and outdoors oriented markets, but may not match today's more sophisticated adventure travellers' needs.

In terms of outdoor products (commercially available recreation), the Quesnel region offers a range of land/snow/water-based products. Over 40 water-based products are available with the most common being fishing and canoeing. Land-based products total 30 individual offerings and range from hiking to wildlife viewing with hiking/backpacking being the single most popular activity. Snow-based products are less common (a total of nine), which range from cross-country skiing to snowmobiling.

Is spite of this broad range of products, it is important to recognize that the majority of these are small-scale, part-time, and seasonal operations. Most are owner-operators with a small number of part-time staff. However, based on this analysis the top three most popular adventure tourism products are fishing, canoeing and backpacking.

Tourism is a significant component of the regional economy and appears to have remained reasonably stable through the 1990s. According to the Visitor Survey, approximately 480,000 travellers visited the North Cariboo. This figure is comprised of 240,000 residents and an equal number of non-residents. This is a significant number of travellers and represents nearly 1.5 million person-days.

The main reasons people visit the area are to see friends and relatives, and to pursue outdoor activities. Both of these trip purposes mesh with the adventure tourism focus of this report. A broader range of commercial outdoor and cultural could be attractive to both of these traditionally strong market segments. This information does not incorporate new markets that could be encouraged to visit the region based on new product developments.

FACTORS AFFECTING TOURISM DEVELOPMENT IN THE NORTH CARIBOO

The area has a broad and diverse inventory of resources on which to base tourism development. This includes three distinct geographic regions of the Interior Plateau – the Fraser Plateau in the west, the Fraser Basin in the central portion, and the Quesnel Highlands in the east. The region has a climate conducive to four-season tourism, the province's most famous river (the Fraser River), two regionally significant rivers (the Blackwater and Quesnel Rivers), numerous productive fish lakes, and a rich heritage.

The region is heavily dependent on forestry although tourism has a solid base and offers good prospects to expand and diversify the economy. The adventure tourism and culture components of tourism are the focus of this analysis and the region is well represented in these areas. The region has the province's largest heritage attraction (Barkerville), and an internationally famous remote canoe route (Bowron Lake chain). The region has a mix of accommodation types and a variety of attractions. Accommodations include hotels, motels, lodges and campgrounds. Attractions are heavily oriented towards heritage-type amenities.

Tourism in the region is driven by three categories of visitors. These include pass-through traffic visitors, destination visitors, and persons visiting friends and relatives The pass-through market is the highway-oriented vehicle traffic travelling north and south on Highway 97. The destination visitors are those persons fishing at the fly-in and road accessed lodges, canoeing in Bowron Lake Park, taking ranch vacations, and visiting Barkerville. Persons visiting their friends and relatives are concentrated in the key population centre of Quesnel.

Summer generates about two-thirds of total tourism business, while spring and winter account for about 15% each. There are no comprehensive measures of tourism performance, however, there has been an increase in the number of accommodation properties and the resulting room revenue. Overall, tourism appears to have performed reasonably well over the last decade.

Numerous organizations and agencies are involved in the management and administration of tourism. The key local agencies expected to have a role in advancing adventure tourism in the region are Quesnel Community and Economic Development Corporation, and the Community Futures Development Corporation.

TRENDS IMPACTING TOURISM

Age, life stages, and earning power are key determinants for the purchase of travel products. Now, and in the future, the group having the most dramatic impact on the travel industry is the baby boomers - those persons born between 1946 and 1964. This nearly two decade long period of population growth produced nearly 10 million Canadians and 75 million Americans. In fact, approximately 30% of all Canadians and about 28% of Americans are baby boomers.

This group has been very dominant throughout their life stages and has transformed the market based on their numbers. They created a boom in school construction, in housing starts, in clothing sales, in automobile sales, and in tourism. Their impact on the travel industry will likely become even more dramatic over the next decade. This is because boomers - more than any other group in the recent past - have the financial means and the interest in travelling. Boomers typically travelled when they were younger, both on family holidays and as young adults, and are expected to remain avid travellers as they grow older. As of the mid 1990s, about 40% of all domestic travel in Canada was by baby boomers, and they spent about 50% of all the domestic travel money.

The first baby boomers to enter the peak income earning years (typically 45 to 54) did so in 1991 and the last will come through this period in 2018. Persons in this age group typically have increased incomes, and with children leaving home, the boomer parents will have the ability and the financial means to travel.

The older boomers are saving more money now that their families are growing up - and a portion of this money will be used to travel. Additional future family wealth will be driven by the trend towards two income families through the 1980s and 1990s - that should become two pension families in the current millennium.

An additional financial windfall is anticipated due to the inheritance likely to be passed on by the parents of today's boomers. This group survived two world wars, and the last century's major economic depression. These events caused boomer parents to be very financially cautious through the post war boom of the 1950s and 1960s. Much of this wealth (estimated to exceed $10 trillion throughout North America) will be passed on to today's boomers in the form of inheritance. Boomers will spend a portion of this money on travel.

Future travel by boomers is likely to be different than travel in the past, and boomers are likely to exhibit the following trends:

- more individualistic and perhaps not as likely to travel in groups
- more well travelled and travel savvy, and will be more demanding in obtaining service and value
- more knowledgeable, quality conscious and sophisticated consumers
- interested in a sense of achievement rather than rest and relaxation
- used to being fun seekers and thinking and acting young - this will continue as they age
- more environmentally aware and may shun mass travel destinations
- more likely to be interested in cultural or educational themes to their travels
- well educated and inclined to expand their education through learning oriented travel

These trends are expected to be very significant for the North Cariboo. The dominance of the baby boomer market for travel generally is well documented and they are expected to continue to be the dominant socio-economic cohort. This demographic age group is also the key consumer of adventure travel, particularly soft adventure, the focus of this analysis. Marketing programs geared solely to this group should form the basis of individual facility, community and regional marketing plans.

ADVENTURE TOURISM TRENDS AFFECTING THE NORTH CARIBOO

The focus of this analysis is on adventure tourism and cultural tourism. As components of the tourism industry, they probably represent about 20% to 30% of total tourism spending (accommodation, food and beverage, transportation, retail and other travel services make up the remainder).

Adventure travellers want outdoor experiences that are unique and genuine, as opposed to contrived or superficial. Enriching, fulfilling adventure experiences are sought as travellers look for more experiential, participatory, and fun experiences that provide some level of learning. The North Cariboo offers the "real thing" in terms of adventure travel with indigenous cultural attractions and authentic rural outdoor products. Typically, facility owners, and the staff dealing with the patrons, are from the area and provide the friendly western hospitality for which the area is known.

Adventure travellers have often experienced adventure trips in other destinations and are attuned to good quality - they are willing to pay, but only if the value and quality of experience is there. This will be a particularly significant issue as the adventure sector in the region develops. Adventure travellers are well travelled and can be demanding, and they expect good facilities and good service.

Adventure oriented travellers are increasingly sensitive to environmental practices and conditions. The existing Cariboo-Chilcotin Land Use Plan and its zonation recommendations should assist adventure tourism development by preserving natural appearing areas.

Adventure tourists are also more respectful of local values, traditions, and cultures than was the case in the past. Although not a focus of this analysis, this characteristic of adventure travellers will be very important if First Nations communities in the region embrace tourism as part of their economic development strategies.

NORTH CARIBOO TOURISM ANALYSIS

A considerable amount of tourism research and planning has been conducted in the Quesnel study area over the last decade. Significant progress has been made in expanding the tourism industry, although much remains to be done. Key reasons that tourism growth has been spotty are the area's distance from markets, the small population and related number of tourist facilities, limited number of significant attractions, and intervening opportunities closer to the population centre markets. There has also been a lack of resources to develop tourism facilities and to market the area.

From the perspective of developing the adventure tourism/culture tourism sectors, the region has a number of significant strengths. In terms of the natural environment these strengths are based on wilderness and scenery, plus the variety of fish and wildlife resources. Significant wilderness and scenic features are preserved in provincial parks in the east and west portions of the region. The region has the province's most well known river (Fraser) as well as several regionally significant rivers (Blackwater and Quesnel), all with valuable canoeing/kayaking and fishing opportunities. However, the region's most significant tourism resources - both of which are nationally significant - are Barkerville and the Bowron Lake canoe circuit.

Countering these strengths are a number of weaknesses which need to be addressed in order for the industry to grow. Transportation and access is a deterrent as the region is "a day's drive" from Vancouver as a market and as an international gateway. Highway 97 has also only two lanes for much of its length through the region. Air access capacity to Quesnel has declined, while costs remain high. In terms of market issues, the market is relatively small, seasonal, and heavily based pass-through traffic. The region also has a limited number of dedicated tourism facilities.

Opportunities exist for land, water and snow-based adventure tourism activities – all of which are significant. Market opportunities exist to capture a greater number of the pass-through vehicles, as well as to create more of a destination image for the area. The more urban or frontcountry opportunities are best suited for the pass-through market, and the backcountry opportunities for the destination market.

Threats, or outside factors influencing tourism, are significant deterrents to future tourism development. Key to rural or backcountry tourism is access to the land base – for facility construction, for touring, and as scenic viewscapes. Impediments to securing land access are First Nations land claims and by resource use conflicts. Pine beetle infestations are not as serious as in other areas of the central interior, but the spread and the resulting salvage logging is a serious concern. Continuation of the fragile economy in central BC is also affecting the area's ability to attract investors and capital.

The tourism product analysis process included the systematic evaluation of nearly 30 outdoor activities. This resource, market and economic evaluation lead to the ten products selected, of which six are land-based, two snow-based and two water-based. These products are (in alphabetical order):

- Automobile touring
- Freshwater fishing
- Heritage attractions
- Hiking
- Industrial Tourism
- Lodges
- Non Alpine Winter Activities
- River Kayaking/Canoeing

- Snowmobiling
- Wildlife Viewing

ADVENTURE TOURSIM OPPORTUNITIES FOR THE NORTH CARIBOO

Information has been provided in the main report on a series of topics for each product. The following information focuses on the actual development opportunities and the suggested locations for each product.

- **Automobile Touring**

Automobile touring includes vehicle-based sightseeing. It includes all roads that are capable of being driven safely by 2-wheel drive vehicles, including both paved and unpaved roads. Opportunities exist in two distinct areas. One is the provision of guided tours. The other is to service visitors who stay in the region because of the touring/sightseeing opportunities. This includes accommodation, food and beverage services, entertainment and recreation. The locations offering potential are as follows.

Barkerville – Likely: This loop provides a round-trip from Quesnel east to Barkerville, and on to the 3100 Road from Barkerville through the Cariboo Mountains to Likely (approximately 100 km), and connecting to Highway 97. This 300 km route is extremely scenic with spectacular views of the Cariboo Mountains along the Mathew Valley. Opportunities exist for hiking (Cameron Ridge), fishing (Cariboo River), and wildlife viewing.

Nazko Valley Loop: Quesnel along the Blackwater Road to Nazko (approximately 100 km), north to Gillies Crossing, back to Backwater Road. The Nazko Valley contains some of the area's oldest homesteads and provides scenic river and lake environments. Opportunities exist for fishing, hiking and winter activities along this 200 km route.

West Fraser Loop: From Quesnel this route crosses the Fraser River and heads down the West Fraser Road to Marguerite and back across the Fraser River by reaction ferry, and return to Quesnel along Highway 97 (about 120 km return). The route winds through ranch country and the Fraser River bench lands. Opportunities exist for hiking and wildlife viewing.

- **Freshwater Fishing**

Fishing includes casual to more serious sport anglers. The former is more likely to prefer easy access to high quantities of small fish, and the later more likely to seek out (and pay for) more remote, higher quality opportunities in wilderness settings. Commercial opportunities include packaged fishing tours, fishing resorts, as well as the indirect revenues associated with accommodation and other services for independent anglers.

The highest potential for guided and/or lodge-based fishing is into the western portion of the region. Several lakes including Marmot Lake and Fishpot Lake provide excellent fly-fishing and yield rainbows from 5 to 8 lbs. Brown (Bishop) Lake is a trophy lake yielding rainbows up to 15 lbs. The Blackwater (West Road), Baezaeko and Nazko Rivers offer excellent fly-fishing for rainbow and bull trout.

It should be noted that guided angling days have been limited by the Ministry of Environment in many of these locations. There may be some commercial fishing potential in the east and southeast and adjacent areas outside the forest district, such as the rivers and lakes associated with the Quesnel and

Horsefly rivers and the Matthew River-Ghost Lake area. Other locations include Quesnel River and the Bowron Lake Chain.

- **Heritage Attractions**

Cariboo gold rush history is interpreted at Barkerville - perhaps the province's single most significant heritage attraction. The length of time Barkerville has been in existence has established heritage as a key theme for the region. The region is also well endowed with several major heritage trails.

Heritage appreciation lends itself to guided, package tours as travellers are willing to pay for the convenience of being taken to major sites, learning from informed guides and having transportation, meals and accommodation arranged. The following are the key opportunities.

Barkerville is well known as a significant provincial heritage site. Also, there are a large number of undeveloped sites that are thematically linked to Barkerville such as Stanley, Grouse Creek and Antler Creek. A complete inventory of heritage sites related to Barkerville has not been completed, but many smaller sites can be incorporated into tours.

Wells is a company town from the 'second gold rush' in the 1930s, which now provides services for visitors to Barkerville and Bowron Lake. It has a unique heritage streetscape, with galleries and shops an active art community and an art school offering courses in all seasons.

Cottonwood House is a 1860s roadhouse built to serve the miners travelling to the goldfields and features farm animals, gardens and household displays. Quesnelle Forks and Keithley Creek (just outside area) were significant towns during the gold rush. Quesnelle Forks was one of the largest Chinese settlements in the Interior.

Historic Trails include the Cariboo Waggon Road, 1861 Gold rush Pack Trail, the Goat River Trail, Collins Overland Telegraph Trail, Native heritage routes, and Alexander Mackenzie/Grease Trail.

Nazko area sites include the Blackwater Homestead, Krestenuk Trading Post, original schoolhouse and church, Chuntezni'i Cemetery and Homesteader Cemetery. The Quesnel And District Museum and Archives presents an excellent summary of the goldrush, ranching and forestry history of the Quesnel area. The Quesnel and District Antique Machinery Museum and the riverfront walking tour are additional heritage resources.

- **Hiking**

Hiking is comprised of a range of activities from casual and easy, to challenging and difficult. The spectrum includes day-hiking, backpacking, trekking, mountaineering, and heli-hiking. Hiking and backpacking involve walking on trails in the front/mid/backcountry. Hiking is the less demanding form of trail use, typically on less arduous trails, in the front/mid country, for short durations. Backpacking is a more adventurous and demanding form of hiking and involves overnight travel in the mid/back-country.

Hiking opportunities exist in two categories. One is guided and interpreted hiking, both for short hikes and longer backpacking trips. The other, more indirect opportunity, is the support services of overnight accommodation and related services to be purchased by hikers before and after the hike.

The Wells area has a well-developed trail network that includes short (2 to 7 km walks close to the community as well as 5 – 7 hour alpine hikes to Mt. Agnes, Mt. Murray, Mt. Tinsdale or Two Sisters. The Stanley-Barkerville section of the Cariboo Waggon Road is also a popular day-hike. In addition Wells-Barkerville is situated between two important sections of the National Hiking Trail – the Goat River Trail from Highway 16 to Barkerville and the 1861 Goldrush Pack Trail from Barkerville to Keithley Creek. These trails provide multi-day hiking opportunities and would be suitable for guided experiences.

The National Hiking Trail (a new non-motorized national trail) continues west of Quesnel along the Collins Overland Telegraph Trail to the Alexander Mackenzie Trail, which runs along the Blackwater (West Road) River west to Bella Coola. There are currently limited hiking opportunities within the Cariboo Mountains and Bowron Lakes Park (within the Quesnel Forest District), but opportunities exist for the "hard" adventure market. The same market applies for the Itcha-Ilgatchuz Mountains.

In the Nazko area there are several short nature hiking potential trips to plateau lakes which have high shoreline diversity and wildlife features. The Fraser River bluffs to the north and south of Quesnel offer very accessible hiking in close proximity to Highway 97 and to population centers. Heli-hiking potential in mountainous areas (Cariboo Mountains, Quesnel Highlands, Itcha-Ilgatcho), although potential conflicts with caribou may restrict this opportunity.

- **Industrial Tourism**

Industrial tourism refers to a range of activities that link the primary economic sectors (forestry, agriculture and mining) with tourism. It includes mill and forestry tours, farm tours and guest ranches, and mine tours and gold panning.

Opportunities exist to produce tours of existing operations or to allow paying customers to work at existing businesses (specifically farms and ranches). Due to the gold mining history of the region, there are good opportunities to demonstrate the techniques and interpret the history of this aspect of the province's development.

Forestry resources include the mills in Quesnel and their associated woodland operations. There is potential to interpret modified harvesting techniques in the Quesnel Highlands especially as part of the Cornish Mountain Trail network at Wells. Agriculture resources include the ranches, farms and guest ranches in the area. Farm and ranches also exist in the Nazko. Barkerville/Wells is the key focus for gold panning but the activity could be pursued on local creeks or around the other heritage communities along the historic access routes.

- **Lodges**

Lodges and resorts are roofed accommodations having an outdoor recreation focus. The Cariboo has historically been known for its abundance of fishing resorts and guest ranches.

There is an opportunity to create resort/lodge developments tied in with one or more of the other adventure tourism products discussed in this analysis such as canoeing, wildlife viewing, or water recreation activities. The most appropriate scale (at least initially) would be small, perhaps in the 10 to 20 room/units size. A development of this size would provide operating efficiencies, and would provide the intimacy of a small lodge experience.

In the eastern portion of the study area, there is reported to be interest in developing a lodge at Stanley (near Wells-Barkerville) in order to offer heritage based tours. There is potential to locate a lodge in the Matthew Valley near Ghost Lake. Pleasant Valley (near Wells) would offer easy access to Barkerville, the cultural attractions in Wells, as well as winter recreation opportunities. Wells itself could be the base for a lodge offering cultural and natural experiences.

In the western half of the Forest District, most of the larger fishing lakes have lodge development. However, there is potential for existing lodges to expand into other aspects of adventure touring, offering both summer and winter products.

- **Non-Alpine Winter Activities**

The non-alpine winter product is a "roll-up" of several activities and includes cross-country skiing, backcountry skiing, snowshoeing, ice skating, ice sailing, dog-sledding, ice fishing, skijoring (dog(s) pulling a person on skis). With the exception of backcountry skiing, all of these activities can be pursued by novices or people with limited experience. Also, technology is making these activities more accessible and safer (easier to use equipment for novices).

The community of Nazko hopes to develop 'Trapper Cabin' retreats in the western part of the Forest District this could be linked to ice fishing, cross-country skiing, snowmobiling, ice climbing and snowshoeing. The lodges at Bowron Lake could expand into winter products including dog sledding on Bowron Lake. Wells is an ideal location from which to experience winter activities along with courses in the arts, evening cultural events or winter carnival. Winter star-gazing is a popular activity.

Dog Sled operators from outside the area have brought clients to the Gold Rush Trail Sled Dog Mail Run from Quesnel to Wells. This event is coupled with a winter carnival in Wells that features events featuring skiing, dogsledding and snowmobiling.

- **River Kayaking/Canoeing**

River recreation includes a variety of potential activities including kayaking, canoeing, rafting, boating, jet boating, and tubing. There are various categories of river recreation based on water volumes, rapids and gradient.

Canoeing generally requires slower moving rivers and streams and also takes place on lakes. Rafting is usually associated with larger rivers and commercial operations. Canoeing and kayaking are most often non-commercial activities. Tubing is a casual activity, often associated with family swimming, beach activities, and leisurely river drifts. Several river recreation locations exist in the region. The key rivers are:

The **Blackwater River** provides a multi-day whitewater experience along a natural river; day trips on some sections are possible; difficulty ranges from I to III+. The Nazko River provides a day trip with good fishing on flat water.

The **Cariboo River** from Kimball Lake to Cariboo Lake is a long day or overnight trip on flat water which provides excellent wildlife viewing and scenery. Below Cariboo Lake to Quesnelle Forks is suitable for rafting with Grade II to IV rapids.

The **Quesnel River** is suitable a variety of experiences from rafting and kayaking in the section from Likely to Quesnelle Forks and in the Big Canyon near Quesnel to float trips through natural ranch land settings.

The **Fraser River** is suitable for trips by jet boat, voyageur canoe or zodiac. There is a suitable landing area in downtown Quesnel.

- **Snowmobiling**

Snowmobiling involves snowmachine use on logging roads, trails and open areas for touring. Commercial opportunities exist for guided tours and for the related sales, service and maintenance. There are also revenues from the use of other traveller services needed by independent smowmobilers.

Experienced snowmobilers are not likely to purchase tours, but they will spend on accommodation and related travel services. Less experienced or novice snowmobilers are good candidates for tours. A possible development opportunity for snowmobiling is a dedicated snowmobile lodge. This could be developed in the eastern or western portion of the North Cariboo. It could also provide a range of non-alpine activities and also a range of summer activities.

Wells area has well developed trail system including loops for family riding and access to two alpine areas – Groundhog Lake and Yanks Peak. The Gold Rush Trail provides linkages to Prince George, Quesnel and Likely for long distance touring. Quesnel area has two trail networks – the 'Chip Dump' Trails and Milburn Mountain Trails. Nazko is well situated to develop a network of winter trails including the Alexander Mackenzie Trail, Martin Meadow and Kluskus Trail. There is also access to the high elevation areas of the Itcha Mountains from Nazko.

- **Wildlife Viewing**

Wildlife viewing is the act of observing the behaviour of animals in their natural habitat. There are several distinct groups: carnivores (black bear, grizzly bear, cougar, wolves, coyotes); ungulates (mule deer, elk, caribou, moose); birds (waterfowl, shorebirds, water birds, birds of prey, passerines, upland game birds); fish, especially salmon runs.

The product involves guiding people to viewing areas and providing interpretation. The region has good potential because of the simplicity of the activity and broad appeal of seeing animals in their natural environment. Several sites have high wildlife viewing potential.

Bowron Lakes canoe circuit provides excellent potential to see deer, moose, black and grizzly bears. At the bridge at the mouth of the Bowron River sockeye salmon, bald eagles and osprey can be seen. The slough at the south end of Bowron Lake can be accessed as a day trip to see a variety of birds including eagles, osprey, and bitterns.

The wetlands surrounding Wells provide birding opportunities especially in spring and fall when migratory birds including swans may be seen. Mule deer, white-tailed deer, moose and caribou are often seen on Highway 26 between Quesnel and Wells. The Quesnel Highlands and Itchas-Ilgatchuz are home to caribou, bear and mountain goat.

The Nazko Valley provides excellent birding. Bald Eagles and osprey nest along the Nazko and Blackwater rivers, rare white pelicans feed at Wutlus and Tzazati Lakes, and trumpeter swans can be seen at Gillies Crossing. As well this area is home to most large ungulates as well as bears, wolves, cougars and lynx.

ECONOMIC IMPACT POTENTIAL OF ADVENTURE TOURISM PRODUCTS

The preceding analysis presents a description of opportunities and development considerations for the ten products assessed. Each product has been discussed individually and independently, based on a number of development criteria. This review has produced a consistent summary of the development potential of each product.

This analysis does not, however, indicate which products are likely to be the most significant or offer the greatest economic impact. Taking into consideration the likely development cost as well as the revenue generating potential, a ranking of the products was conducted.

Based on this comparison of products, the three products likely to have the greatest economic impact on the region are lodges, heritage attractions, and snowmobiling. All three **rated** "High" in terms of their economic impact, and were **ranked** 1, 2 and 3 in order of their anticipated impact. These three products also have high development costs relative to the other products.

At the other end of the scale are Industrial tourism, Automobile touring, and River Kayaking/Canoeing – which all scored relatively low ratings, and ranked 8, 9 and 10. Although rating down the scale in terms of economic impact, they are also the least costly to develop, and relatively easy to initiate.

It is important to note that the above is an analytical process intended to provide an unbiased assessment of the development potential of the products. This should not preclude individuals or groups, who have a particular interest or passion for an activity that did not score high, from pursing the activity. Economic impacts (both revenue and jobs) will only be created if entrepreneurs and investors put up capital to develop these opportunities.

TOURISM PRODUCT POTENTIAL BY GEOGRAPHIC MARKET

Half of the products assessed (touring, fishing, hiking, lodges, river recreation and wildlife viewing) have strong (High) appeal to the close-in markets (Regional and Provincial). These markets are typically driving, and are within one to "a few" hours driving time away. These two markets segments currently comprise over 60% of the traveller market to the region.

The products generally do not have particularly high appeal to the more distant markets in Canada and in the Pacific Northwest. These origin groups make up about one-quarter of the current market. There is strong appeal for many of the products in the more distant international markets. This is based on the uniqueness of these product offerings to the international market, and the likely appeal to this group. It is important to note that the international/offshore market is relatively small (about 13%) but could be particularly significant for individual products.

TOURISM PRODUCTS BY LAND USE ZONE

The Protected Areas and the SRDZ are by far the most relevant zones to accommodate most forms of adventure tourism development based on this analysis. Some activities would be precluded from parks, but most would benefit from the total resource protection afforded by this protected area status.

(However, commercial park use permits would be required.)

The SRDZ is the most appropriate zone for tourism developments, with High ratings achieved for all but two of the products. The other two zones are less appropriate due to resource extraction activities and the resulting impacts on access and viewscapes.

COMPONENTS OF SUCCESSFUL OPERATIONS

The growth in Adventure Tourism provides opportunities for existing tourism operators and for business start-ups. It provides opportunities for multi-million dollar lodge-type products to simple interpreted tours run by a single individual.

Regardless of the kind of tourism business and scale of operation, there are some common ingredients for success. These "success factors" provide new adventure tourism business with guidance and tools for growth. They are generic and should form part of individual business plans. Considerations are as follows:

- selecting a good location
- targeting appropriate markets
- providing a quality experience
- caring for the environment
- providing value-added options
- ensure competent management

TOURISM ACTION PLANS

The overall purpose of this Tourism Opportunity Study was to identify potential tourism developments and to provide guidance on implementation. The preceding sections of this report address the "opportunity identification" objective, and this section is devoted to providing direction on implementation.

This document is strategic - intended to identify and evaluate options, determine the opportunities offering the highest priority, and provide guidance and recommendations to assist in furthering tourism development. By design, it is a district wide document, although references are made throughout on general and specific locations, and to individual communities.

The focus of this analysis has been entirely on the adventure and cultural components of the tourism industry. Many other tourism development considerations may be appropriate at the community level but they have not been within the scope of this report.

ADMINISTRATION AND MANAGEMENT

Endorse the contents of this study.

This report presents an analysis of opportunities within the adventure/cultural components of tourism. By design, it does not address urban opportunities, nor does it consider the many First Nations opportunities possible in the region. Information is presented to assist local agencies in priorizing their assistance, in guiding regulatory agencies with their decisions, and in providing background information to developers, investors and entrepreneurs.

The tourism industry needs a "champion" to assist with study implementation.

Tourism is a difficult economic sector to manage because it cuts across, or overlaps with, a number of other sectors. Expansion is largely dependent on the private sector, with permitting and regulations undertaken by various government agencies. (It is noted that there has been a significant public sector investment in the region, including the creation of new parks, Barkerville and investment in the Wells Gateway programs.) The Local Advisory Committee for this project strongly voiced the opinion that a central coordinating agency was necessary to manage implementation of this Tourism Opportunity Study.

Focus tourism development in the most suitable zones.

Most of the tourism products discussed here are dependent on (or benefit from) unaltered landscapes. Within the Cariboo-Chilcotin Land Use Plan area, the two zones that are intended to preserve the visual resource base are the Protected Areas and the Special Resource Development Zone.

Focus on implementing the actions described in the individual product write-ups.

Each of the ten products described earlier includes a list of actions intended to foster implementation. These are discussed under the headings of administrative issues, marketing and development.

Encourage clustering as a tourism development concept.

Currently Quesnel, because of its urban nature, provides a "cluster" of accommodation, restaurant, entertainment and retail amenities. With the exception of Wells on a much smaller scale, no other clustering of facilities or amenities exists in the region. Tourists benefits when a number of things to see and do are grouped together in close proximity. This "shopping centre" approach benefits the businesses by focusing greater attention on the cluster than on individual businesses.

Expand the marketing exposure of the North Cariboo.

The Cariboo-Chilcotin-Coast Tourism Association, the communities of Quesnel and Wells, and Barkerville are the key agencies marketing and promoting the region. Increased marketing would likely lead to an increased volume of business and an improved environment in which to encourage new development.

A central reservation system would expand sales and retain tourists.

Tourists (like all consumers) appreciate purchase convenience. If Quesnel (as the key center and gateway to the east and west portions of the region) could offer point-of-sale convenience, greater tourism retention should be possible. The ideal system would allow a tourist to book accommodation, tours and adventure tourism products in one place. This could be done in person in a kiosk type environment at the Visitor Information Centre and over the Internet.

Take the opportunities in this report to the marketplace.

Tourism development will be undertaken by existing operators, by potential entrepreneurs in the area, or by operators active elsewhere and/or outside investors. They need to know about the opportunities and be encouraged to get involved.

COMMUNITY BASED ACTION PLANS

Although this TOS is regional is scope, tourism development occurs at the local level. Tourism projects are often initiated by local agencies such as chambers of commerce or economic development commissions, and they are always site or location-specific. Also capital investments are locally based and revenues are generated (and jobs created) at the local level.

Consequently, guidance is provided here to assist the three communities in expanding their involvement in tourism. The observations are solidly based on market research and analysis of the resources. The opportunities are meant to add to the knowledge base in order to advance the tourism planning process.

The value being added by this report is that a regional and market-based perspective is being brought to the community level. It involves an integration of regionally based information with tourism development to be delivered locally.

- **Quesnel**

Background: Quesnel is the tourism service centre for the region, having most of the area's accommodation, food services, and retail outlets. However, the city has not had a strong tourism orientation, although this is changing, as the city has done a good job with its heritage displays and with the riverfront trail. It has also recently charged the Quesnel Community Economic Development Corporation with the tourism development, marketing and information services functions.

Quesnel has an Economic Development Strategy produced in 1999. The tourism vision states that the community will increase its role as a gateway to outdoor adventure tourism. There is expected to be increased linkages with Wells and with the Nazko/Blackwater area. The plan states that efforts should be devoted to improving the city's tourism infrastructure and attractions.

Themes: Quesnel evolved as a forestry community and forestry remains the key economic sector. Tourism should attempt to augment this sector in order to diversify the economic base. An industrial theme and staging ground to adventure tourism are appropriate focuses.

Products: Industrial tourism is the key product. Other products offering potential are automobile touring and fishing.

Markets: The markets are predominantly automobile pass-through travellers, including BC residents and Alaska bound Americans. The destination market is heavily oriented to people visiting friends and relatives.

- **Wells/Barkerville/Bowron Lake**

Background: Wells prepared a strategy for outdoor recreation and culture-based tourism in January 2000. The strategy is intended to get more Barkerville destined pass-through visitors to stop in Wells, and to build the shoulder and winter season destination market. The current Gateway project has provided the resources to work on infrastructure development, skills development, and marketing.

The District has identified a number of projects intended to meet their tourism visitation goals. These include assisting BC Parks with planning for the new Cariboo Mountain and Cariboo River Parks, developing Learning Holidays, skills development, trail development, and marketing.

Tourism Themes: Wells would benefit from continuing to focus its tourism development on the 1930s mining theme. It is an indigenous theme relying visually on the many commercial and residential building that still exist. It also is a natural tie-in with the earlier era gold mining theme of Barkerville. In addition to the architectural appearance of Wells, the other focuses of culture/heritage and adventure tourism are strongly supported by the analysis in this TOS report.

A particularly unique asset of Wells is a gaming licence for a local site, one of only a few that have been granted by the provincial government. Effectively developed in keeping with the aspirations of the community, and in scale with the community, it could be a key draw to the area. It could also be influential in getting Barkerville-bound travellers to stop and to stay longer. This development could allow Wells to offer a tourism experience similar to Dawson City, Yukon.

Products: In addition to the above, the key summer products are automobile touring, heritage attractions, hiking, lodges, river recreation, and wildlife viewing. In the winter, snowmobiling and other non-alpine skiing have good resources and an established reputation.

Markets: The markets are predominantly regional and provincial for all the above products. However, properly packaged and serviced, there is potential in attracting international visitors (from Europe and Asia) particularly for the non-alpine skiing winter experiences and for the lodge experience.

- **Nazko/ West Region**

Background: Nazko is a relatively isolated community within the region and has only a minimal tourism industry. The traditional components have been guide-outfitting and remote fishing lodges. The community is small but is reportedly interested in pursuing tourism to create jobs and income for residents.

Themes: Perhaps the strongest theme or focus that is relevant for the community is First Nations culture. (Due to the lack of First Nations involvement in this study, First Nations' based tourism development opportunities were intentionally not addressed in this TOS analysis.)

Products: In addition to the above, other products offering potential for the community are fishing, hiking, lodges, river recreation and wildlife viewing. Snowmobiling is the key winter activity.

Markets: The markets are predominantly regional and provincial for all the above products. However, properly packaged and serviced, there is potential in attracting international visitors (from Europe). Key attractions will be non-alpine winter activities and the range of lodge-based activities.

SUMMARY

The North Cariboo area has significant potential to develop its adventure tourism sector. As noted throughout this report, the area already has several historical, cultural and resource features which attract tourists, and provide a significant base upon which to expand adventure and cultural tourism in the area. At the same time, the area also has numerous natural resources and features which could support new adventure tourism businesses.

Tourism businesses are typically developed at the local level. Although research and planning can provide information and direction at a provincial and regional level, actual product development occurs locally, on specific sites. This TOS report is intended to provide guidance for adventure tourism development throughout the study area. For tourism development to be successful, however, local communities must see tourism as one of their key economic development objectives, and must be welcoming to tourists. Within the North Cariboo both Quesnel (September 1999) and Wells (January 2000) have reasonably current economic development strategies and both of these communities strongly endorse further tourism development and expansion.

This report suggests that the key tourism development roles for Quesnel are as a focus for industrially based tourism and as a staging area for adventure tourism, both in the west and the east. The adventure tourism products seen as having the most potential in and around Quesnel are automobile touring and fishing. Wells has the opportunity to continue to focus and develop its unique mining and heritage themes. New potential adventure tourism product options include lodge development, river recreation, wildlife viewing, snowmobiling and other non-alpine winter activities. The Nazko area offers a remote community experience in relatively close proximity to larger population centers and travel routes. The First Nations focus is perhaps the strongest theme, with a range of possible adventure tourism products including fishing, hiking, lodges, river recreation wildlife viewing and snowmobiling.

A series of administrative/management actions have been recommended in this report to advance tourism development in the region. The key administrative issues are to endorse this TOS and to charge an agency with the responsibility to implement the recommendations presented here. The issue of championing the implementation needs to be discussed with the other two areas within the region (the Williams Lake area and the Chilcotin) as there could be opportunities in pursuing the opportunities jointly. Key marketing recommendations are to expand the North Cariboo tourism marketing and to develop a central reservation system.

Within the study area, adventure tourism's resource requirements have been recognized and offered some level of protection through the Cariboo-Chilcotin Land Use Plan. However, tourism interests, particularly backcountry tourism, need to continue to be represented at the planning tables during the current round of sub-regional planning in the Cariboo Forest Region.

There seems little doubt that adventure tourism sector will continue to expand in North America. Those communities that understand adventure tourism market trends - and can actively identify local resources and develop business opportunities - will be able to benefit from growth in the sector. While significant opportunities exist, as noted in this document, it is important that land-based planning and resource development processes recognize the importance of the land and resource requirements of the adventure travel sector. As well, it is important that growth in the adventure tourism sector be properly managed to avoid negative environmental impacts and conflicts with local recreational users. Developing and managing an active adventure tourism sector will take significant local effort, but the rewards to successful communities can be significant in terms of employment and economic development.

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1.0 INTRODUCTION

1.1 BACKGROUND

The Ministry of Small Business, Tourism and Culture (MSBTC) is sponsoring a Tourism Opportunities Study (TOS) for the Quesnel Forest District. This project is one of several studies being conducted in the province. It is a continuation of the Forest Recreation and Tourism Studies that the Tourism Branch has completed over the last several years, and the Tourism Resource Inventory (TRI) product modelling undertaken since 1992.

The intent of this study is to identify tourism opportunities and prepare a report that can be used as a planning tool for the expansion of existing, and development of new, tourism businesses. The study encompasses ecotourism and adventure tourism opportunities within the forest district, focusing particularly on Crown land.

Tourism Opportunity Studies are defined as information tools that can be used to identify and develop tourism development opportunities. The studies are intended to be tools for existing and potential operators, government planners, and local communities. A TOS is intended to:

- Identify adventure tourism markets, trends and product development demands
- Create an updated inventory of natural features and tourism resources, which would be of interest to adventure tourism developers and operators.
- Identify existing adventure tourism operators in the region, their products and their geographical areas of interest.
- Provide an analysis of local characteristics and land and resource management issues that could affect adventure tourism development.
- Identify those adventure tourism products and activities which the region has the best opportunity to develop, and
- Provide an adventure tourism product development action plan for parties interested in developing the region's related opportunities.

The key purpose of the Quesnel TOS is to identify opportunities for future tourism development. Expansion of the tourism industry is intended to:

- diversify the local economy
- maintain access to recreational resources for local residents
- minimize conflicts between resource users

The information provided by this study is intended to identify specific tourism development opportunities within a number of product categories. It is intended to provide market rationale and resource suitability analysis, and identify general locations that are deemed to have potential for development.

1.2 TOURISM DEVELOPMENT ISSUES

Internationally, tourism is the world's biggest industry (as measured by export earnings). In 1999, tourism generated over $455 billion (US) based on about 664 million cross-border trips. Receipts from international tourism have increased by an average of 9% annually since the 1950s, while international arrivals have increased by nearly 7%.

Directly and indirectly, tourism is reported to make up 11% of global gross domestic product and supports about 230 million jobs. In spite of the large size of the industry, tourism has been growing at double-digit rates for the last decade. After two years of flat growth in the 1990s, growth is expected to continue based on the aging baby boom generation in North America and a growing middle class in many developing regions. Tourism has been growing faster than the general economic growth throughout much of the developed world. (Source: World Tourism Organization.)

Tourism is a relatively young industry in Canada and British Columbia. It is only in the last 50 years that tourism has become a mass market and family oriented activity. Over this period, but particularly in the last two decades, tourism has changed dramatically in B.C. In one generation, tourism has evolved from a predominantly summer activity to one which is multi-season with a wide diversity of activities. A generation ago, the typical summer activities involved camping, beach activities, fishing and touring. Tourism facilities consisted of small hotels, campgrounds, auto courts, and some very original roadside attractions. Today, tourism is splintered into numerous specialty niche markets based on activities such as outdoor sports (summer and winter); arts, theatre and cultural attractions; and wildlife viewing. Tourism facilities now include commercial attractions, themed restaurants, strata-titled hotels, timeshare resorts, and ecotourism lodges.

At the provincial level, events of the last few years have combined to cause dramatic changes to the B.C. economy. These include changes to timber harvesting practices, declining markets in Asia, historical lows in base metal and other commodity prices, and the virtual collapse of the commercial fishing industry. These and other issues have caused the provincial economy to struggle with performance below the national average. Outside of the urban areas of Vancouver and Victoria, rural economies have been particularly hard hit.

One of the potential bright lights in the economic mix has been tourism. By encouraging non-residents to visit B.C., and residents to travel within the province, significant impacts can be realized in local economies. The diverse nature of tourism spending - and economic spin-off effects - causes tourism to have a major impact on local economies. By expanding and improving the range of tourism facilities and products, the tourism industry can help diversify local economies.

A step in the process to facilitate the expansion of tourism is to identify the resources on which tourism is dependent. Assessing the quantity and quality of these resources, and matching them with markets, provides the preliminary information necessary to encourage the development of tourism locally. This information can then be used to identify the tourism products (commercial recreation) that appear to have potential, and the locations for these products. This resource assessment, market identification, and product location analysis can then be used to develop strategies and action plans for tourism development.

1.3 STUDY OBJECTIVES

The overall purpose of this analysis is to conduct a Tourism Opportunity Study for the Quesnel Forest District. The deliverables are:

- **Research & Analysis**

The TOS includes detailed background contextual research and analysis on key issues affecting tourism development in the study area. This research includes analysis and discussion of:

- international, national & provincial tourism market information
- provincial and regional tourism development statistics (especially trend analysis)
- local tourism and other economic development strategies
- land & resource management planning and development activities in the study area and their impacts on tourism development.

Included in this component of the TOS is an analysis and discussion of the general opportunities and constraints to ecotourism, adventure travel, and culturally based tourism development in the study area.

- **Opportunity Identification**

Based on the information generated above, the TOS includes an analysis and recommendations on the major ecotourism, adventure travel, and heritage and cultural tourism development opportunities that the study area could support and develop. The methodology for this opportunity analysis includes map-based location analysis. Upon completion of an opportunity identification overview, the analysts worked with a local advisory committee (LAC) to identify ten key tourism product/activities for more detailed analysis. Using the inventory information being obtained separately, the TOS also indicates the most appropriate location for each of the identified key tourism product/activity opportunities within the study area.

- **Local Tourism Development Action Plan**

The final TOS report includes an Action Plan section, which identifies specific strategies and actions that local economic/tourism development organizations within the study area could undertake. These actions are intended to develop and expand ecotourism, adventure travel, heritage and culturally based tourism opportunities in the TOS area.

1.4 STUDY AREA

The study area for this project is the Quesnel Forest District. This region encompasses 210,000 square kilometers located in central British Columbia. The region stretches from the headwaters of the Blackwater (West Road) River in the west to Bowron Lake Provincial Park in the east. The northern border is the confluence of the West Road River and the Fraser River while the southern border is around the communities of Marguerite and Tingley Creek. To distinguish the study area from the larger Cariboo region, and the from the City of Quesnel, the study area has been referred to in this report as either the Quesnel Region or the North Cariboo Region.

Figure 1
Quesnel Tourism Opportunity Study Area

1.5 RESEARCH METHODOLOGY

Completion of this project involved a combination of secondary source information, and primary data from interviews and meetings. The project also relied on the considerable amount of tourism related research that has been conducted in the region over the years.

Completion of the analysis involved a number of steps within a variety of separate topics. These are summarized as follows:

- **Administration and Background:**

- Project signed and initiated mid October, 2000
- Contacted Land Use and Policy Branch representative to discuss project start-up process, timing, meetings, information sources, methodology refinement, etc.
- Formed a project Local Advisory Group (LAC) from a broad cross-section of agency and association representatives (See the Acknowledgements page)
- Obtained and reviewed a large number of relevant background reports and studies. (See Appendix A – Information Sources).

- **Map and Database Information:**

- Obtained the 2000 tourism facility operator listings that had been prepared separately for this project.
- Obtained digital and paper map versions of the study area base map, recreation features, and tourism use areas that had also been collected separately to aid this project.

- **Start-up Meeting with the LAC**

- Met with sixteen members of the LAC in early October to discuss the purpose and scope of the project.
- Refined the proposed work program to better reflect the needs of the group and to best take advantage of the tourism research done to date.

- **Preliminary Research**

- Prepared a profile of the study area containing information on physical features, socio-economic status, and future outlook.
- Summarized information on the area's tourism facilities, tourism features, and recent tourism performance.
- Documented the administrative structure of tourism in the area.
- Obtained information from a number of background reports on the strengths and weaknesses of the area.
- Described the key land and resource issues affecting future tourism development.

- **Product Analysis**

- Developed a product evaluation system for a range of land, water and snow-based activities.
- Selected the top ten commercial recreation opportunities for further market and location analysis.

- **Second LAC Meeting**

- A second meeting was held December 6, 2000 with the LAC to present interim results of the analysis, discuss issues crucial to the analysis, review the proposed Table of Contents, and confirm the product selections.

- **Market Analysis**

- Researched the general societal and tourism trends that are expected to shape interest in and demand for commercial recreation in the future.
- Researched product-specific trends that will influence demand for the commercial recreation activities selected for this project.
- Prepared draft analysis and write-up of market issues generally and by specific product. Issues addressed included product descriptions, market size, demographics and trends.

- **Product Location Mapping**

- Opportunities for development of each product were mapped. Field mapping was completed on paper and mylar overlays at 1:50,000 and 1:250,000 scales, depending on information availability.
- The mapped polygons and lines were digitized onto two separate maps – one denoting winter and the other indicating summer activity areas.

- **Action Plans**

- Specific analysis was conducted on each of the ten products reviewing such factors as Strengths/Weaknesses/Opportunities/Threats (SWOT), trends, development issues, and success factors.
- General and specific locations were proposed and mapped.
- Specific strategies and actions were proposed that local economic/tourism development organizations within the study area could undertake to facilitate development.

- **Third LAC Meeting**

- A third meeting was held with the LAC March 7, 2001, to discuss the draft analysis and action plans.
- This meeting was conducted as a workshop to allow agency representatives the opportunity to contribute to the action planning process.
- Numerous comments and suggestions were made resulting in additional analysis and interpretation

of the information and a more comprehensive Action Plan.

- **Draft Final and Final Report**

- Based on LAC comments, the draft final report was prepared. This included the edits and additions requested at the March 7 LAC meeting, and the Action Plan recommendations.
- Field maps were edited and the final digitized versions prepared.
- The report was submitted electronically to the Ministry of Small Business, Tourism and Culture for further comment in late March 2001.
- Numerous edits were suggested, which were incorporated in April and again in early May, and a final report prepared for client review.

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2.0 NORTH CARIBOO DESCRIPTION

2.1 REGIONAL PROFILE

2.1.1 PHYSICAL FEATURES

- **Physiography**

The Quesnel Forest District is almost entirely comprised of portions of the Interior Plateau, accompanied by a small section of the Columbia Mountains in the extreme eastern portions of the district. Within the district, the Interior Plateau is represented by three subdivisions, the Fraser Basin, Fraser Plateau and Quesnel Highland.

The Fraser Basin occupies the lower elevations generally below 1,000 meters and flanks the major drainages such as the Fraser, Blackwater and lower Quesnel Rivers. The Fraser Basin is generally an area of deep glacial deposits with a flat to gently rolling surface. Drainage is often poorly organized and small lakes, swamps and wetlands are common. The Fraser River and lower sections of its tributary streams have incised themselves below the surface of the lowland creating relatively steep areas where local relief is several hundred meters.

Above 1,000 meters, the Fraser Lowland gives way to the Fraser Plateau, which extends westward to form about half the area of the forest district. Small portions of the Plateau are also found east of the Fraser River. Similar to the Fraser Lowland, the Fraser Plateau is also mostly flat to gently rolling and composed of deep deposits of glacial drift. Drumlins and eskers often provide the main vertical relief. The underlying bedrock is basalt lava that sometimes shows at the surface as cliffs along drainages and rocky escarpments. To the southwest two shield volcanoes rise above the plateau at Far Mountain and Downton Mountain. The summit elevations of these distinctive features are between 2,350 and 2,400 meters.

Thirty-five kilometers east of Quesnel, the Fraser Plateau borders the Quesnel Highland, a mountainous area that is transitional between the Plateau to the west and the Columbia Mountains to the east. Most summits are rounded but a few of the highest peaks are above 2,100 meters such as Mount Tinsdale and Two Sisters Mountain and have serrated peaks and cirque erosional features.

A small section of the Cariboo Mountains (a subdivision of the Columbia Mountains) are found in eastern portions of the forest district around the Bowron Lake chains and upper Matthew River. This is a rugged area of high summits and deep valleys where local relief frequently exceeds 1,500 meters. The Cariboo Mountains were intensely glaciated and the summits, which are often over 2,300 meters elevation, feature serrated peaks, sculptured cirque basins and remnant glaciers, especially on north-facing slopes.

Soil in the west portion of the study area includes predominantly Classes 5 and 6. (Class 5 soils are defined as having very severe limitations that restrict their capability to producing perennial forage crops. Class 6 soils are capable only of producing perennial forage crops.) Soils in the east tend to be Class 6 and 7 where Class 7 soils have no capability for arable culture or pasture.

- **Climate**

The Quesnel Forest District lies on the leeward side of the Coast Mountains and is consequently relatively dry. There are periodic incursions of moist maritime air alternating with cold Arctic air invasions in the winter. The climate in the area is characterized by long, cold winters and warm summers. Precipitation is generally distributed somewhat evenly through the seasons although areas on the Fraser Plateau tend to experience a wet season in late spring and early summer. Thunderstorms can be common during the warmest summer months. Precipitation increases significantly towards the mountainous areas in the east.

Summer daytime temperatures frequently exceed 15°C but frost may occur in any month of the year. Winter temperatures of -20°C are common and -40°C is not uncommon. Precipitation varies widely, mainly depending upon elevation. On the plateau, annual precipitation is commonly 50cm with winter snow accumulations of 60cm. On the Quesnel Highland precipitation increases to 100cm and in the Cariboo Mountains it may exceed 400cm.

- **Rivers And Lakes**

The Quesnel Forest District lies entirely within the Fraser River drainage. The Fraser bisects the area in a north-south direction and provides the main transportation corridor in terms of railroad and highway access. To the west, drainage is provided by streams of modest flow, reflecting the relatively low amounts of precipitation. The Blackwater River is the major tributary draining the Fraser Plateau. In turn, its tributaries include the Nazko, Coglistiko, Baezaeko and Clisbako rivers. Several smaller streams such as Baker and Narcosli creeks drain directly into the Fraser River from the west.

To the east, the Quesnel and Cottonwood rivers are the main Fraser tributaries that drain the Quesnel Highland and Cariboo Mountains These are relatively large rivers in terms of volume because of the higher precipitation on the eastern mountains. Both rivers have numerous medium-sized tributaries including the Cariboo and Matthew rivers (Quesnel drainage) and the Swift River and Lightning Creek (Cottonwood drainage). To the northeast, headwater sections of the Willow and Bowron rivers are found that flow northward out of the forest district.

There are numerous lakes of various sizes throughout the forest district. Generally, the plateau and lowland areas have the greatest density of lakes but most are small in size; many are ponds, sloughs or marshes. However, there are dozens of lakes that are one or a few kilometers in length and there are several such as Tsacha, Titetown, Tzenzaicut and Dragon lakes that are close to ten or more kilometers long. The largest lakes are in the eastern portion of the forest district associated with the Bowron chain in the Cariboo Mountains. These include Bowron, Indian Point, Isaac (at 40 kilometers long, the largest in the forest district), Lanezi, Sandy, Babcock and Spectacle lakes that form the well known, 110 kilometer-long Bowron canoe route.

- **Flora And Fauna**

The Quesnel Forest District is made up of several biogeoclimatic zones that are mainly distributed by elevation zones. The Sub-Boreal Spruce zone dominates the lower and middle elevations, although there are also elements and transitions to the Sub-Boreal Pine-Spruce and Montane Spruce zones. Generally, the forests are dominated by dense stands of white spruce or by transitional forests of lodgepole pine. Fine-textured soils and disturbed areas support trembling aspen and paper birch. Often, the forest understory is well developed with a rich variety of shrubs and herbs. Douglas fir is common to the lower elevations such as in the Fraser Lowland. With increasing elevation, the Englemann Spruce-Alpine Fir zone is found where Englemann spruce and some alpine fir become the dominant tree species. The western slopes of the Cariboo Mountains and the Quesnel Highland support relatively moist western red cedar and western hemlock forests associated with the Interior Cedar Hemlock zone. At the highest elevations treeless Alpine Tundra areas prevail.

Moose, mule deer and black bear are prevalent throughout most of the forest district. Grizzly bears are common to eastern sections of the district accompanied by mountain goat at the higher elevations. Small populations of caribou also occur in the eastern sections. The Fraser Plateau provides extensive habitats for a wide range of waterfowl, water birds and shorebirds. Almost all the lakes and rivers contain good populations of rainbow trout, kokanee and Dolly Varden char. A major feature of the region is salmon runs in the Fraser River and its tributaries, especially the Quesnel River.

2.1.2 SOCIO-ECONOMIC DESCRIPTION

The study area is heavily based on forestry, but also has a strong service and retail trade sector. Forestry is reported to account for about two-thirds of economic activity in the region (direct and indirect), and officially accounts for about 30% direct of employment. This is a very large proportion of jobs concentrated in the forest sector, which is about three times higher than the provincial average. The largest employers include West Fraser Timber, Slocan Forest Products, Cariboo Pulp and Paper, and Quesnel River Pulp. The area has five sawmills, two pulp mills, two veneer/plywood plants, and two value-added facilities.

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The second largest sector in Quesnel, in terms of employment, is "accommodation and food" at nearly 13%. This is considerably higher than both the regional average (9%) and the BC average (8%). These two business sectors are components of the tourism, making the tourism industry the second largest employer in Quesnel. Other major employers in the city include retail trade (11%), health and social services (9%), and transportation (6%). The City of Quesnel had an experienced labour force of 4,085, and the regional district a total of 33,965 (both figures are 1996). (The regional district includes Williams Lake and 100 Mile.)

The following chart (Table 2-1) represents employment distribution for the largest economic sectors for Quesnel, the Cariboo Regional District, and the province.

Table 2-1
Employment by Sector (1996)

Sector	Quesnel	Cariboo R D	BC
Primary Industry	8.6%	14.6%	5.7%
Agriculture	1.5%	5.0%	2.4%
Fishing & Trapping	0.2%	0.1%	0.5%
Logging/Forestry	5.5%	8.2%	2.1%
Mining	1.3%	1.3%	0.8%
Manufacturing	22.6%	17.1%	10.4%
Construction	5.8%	7.0%	7.5%
Transportation & Communication	6.4%	6.2%	7.5%
Wholesale Trade	2.6%	2.9%	4.8%
Retail Trade	11.4%	11.9%	12.5%
Finance, Insurance, Real Estate	4.0%	3.1%	5.8%

Business Services	2.4%	3.2%	6.8%
Government Services	4.2%	5.2%	5.9%
Educational Services	5.3%	6.7%	6.9%
Health & Social Services	8.7%	7.0%	9.5%
Accom./Food	12.9%	8.8%	8.4%

Source: BC Stats, Community and Regional Profiles.

Population growth has been modest with Local Health Area populations increasing from 26,396 in the last census year (1996), to 27,837 in 2000, representing an annual increase of approximately 1% per year. Quesnel represents nearly half of the total at 11,283 within city limits with an additional 3,000 to 4,000 in the surrounding area.

Average incomes have been similar to the provincial average at around $37,500 per person (1997). However, BC has lost considerable ground in terms of real (after inflation) personal disposable income throughout the 1990s. (Provincial real disposable income per capita declined 7% from 1992 to 1998.)

2.1.3 FUTURE OUTLOOK

The economy and population of the area is expected to exhibit the slow growth trends of the recent past. The drivers of the economy are expected to continue to be forestry (including increased reliance on value-added activity), tourism, and the service industries. There is also expected to be growth in agriculture, high technology, education and the retirement sector. (Sources: Cariboo-Chilcotin Land Use Plan and Quesnel CEDC Development Strategy.)

Population growth is forecast to be modest, increasing from 27,837 in the year 2000 to 28,847 by 2005, and 29,787 by 2010. (Source: BC Stats – Population projections by Local Health Area.). This represents an aggregate growth of 1,950 people over the decade for an annual average growth rate of 0.7%. By comparison, the provincial population is expected to increase from 4.1 million in 2000 to over 4.8, an average annual growth rate of 1.8%.

The following descriptions represent likely futures for the study area over the next five to ten years, by economic sector. (Sources: Quesnel CEDC Development Strategy and Cariboo-Chilcotin Land Use Plan.)

- **Forestry**

Forestry will continue to be the most important industry in the Quesnel Region. Due to the healthy timber supply of the Quesnel Forest District, it is expected that investment by large forest companies will continue. Short-term harvest levels are likely to increase due to a current Mountain Pine Beetle infestation. Salvage and control harvesting of infested stands could be extensive through the western portion of the region.

As a result of an increase in harvesting, there will be an increase in employment in the logging industry as well as in silvaculture work. Strategies such as the Timber Enhancement Strategy will look at options to increase harvesting opportunities. Furthermore, there may be opportunities for utilization of hardwoods and softwood species if market conditions are favourable.

In the short-term, and perhaps longer, the most significant issue facing the local forestry sector is the American countervailing duty case. This case involves US allegations that BC lumber is unfairly subsidized, and as a consequence, the US forest industry wants duties applied to Canadian imports. The case is currently before the US Department of Commerce.

- **Mining**

There will be continued dependence on world commodity market prices to determine the viability of individual mine prospects. Mining exploration and development in the region have been much reduced through the 1990s from traditional levels, although there continues to be numerous small family run operations. Implementation of the Land Use Plan could have a potential negative impact on the sector by restricting access to some areas of mineral potential.

There is a plan to develop an open-pit gold mine in Wells on Cow Mountain. Development plans are underway, although operations will depend on obtaining environmental approvals, and on the price of gold. The site is close enough to Wells that concerns exist regarding visibility, noise and dust.

- **Agriculture**

Continuation of grazing and hay production is expected to continue, although economic viability pressures are also expected to continue. Increases in specialty products and more intensive agriculture, with growth in local and regional markets, are also expected. Agriculture will likely remain an employer of up to 5% of the population.

- **High Technology**

There is a possibility of significant growth in the software, hardware and service components. Although the high technology bubble of the late 1990s has burst, there is expected to be modest growth in his sector. It is a very competitive sector with Greater Victoria and the Okanagan Valley being very successful in encouraging high technology companies to relocate.

Growth is dependent on improvements in high-speed internet connections – both wired and wireless, success in promoting the less expensive northern lifestyle, and improvements in air access capacity and lower fares.

- **Retail and Commercial**

Slow but steady growth is anticipated based on modest growth in regional population and on pass-through traffic. Improvements in Quesnel's downtown area are expected to contribute significantly to retail growth.

- **Tourism**

Tourism has good potential for growth – both in pass-through and destination markets. Growth is anticipated in urban tourism based on continued improvements in downtown Quesnel. Rural tourism growth is anticipated based on expansion of the adventure tourism and culture sectors.

Adventure tourism development is probably best suited for the soft adventure market. This niche is targeted as the resources tend to be of regional/provincial significance, as opposed to national or international significance typically required for the hard or avid adventure market.

- **Summary of Economic Outlook on Tourism**

The main driver of the region's economy will continue to be forestry. The Land Use Plan is expected to assist in reducing conflicts between forestry and tourism, although land-based tourism will continue be very dependent on forested viewscapes. Perhaps the most significant issue affecting forestry and tourism is the pine beetle infestation. Infestations are currently minor, but expansion of the outbreak is possible, as is the resulting increased harvesting. Depending on the locations, impacts on tourism viewscapes could be significant.

Mining needs to be cognizant of the visual, noise and dust impacts of its activity, particularly near population centers such as Wells.

Tourism is expected to increase its role as an employer and a generator of revenue. It has strong potential, both encouraging pass through traffic to stay longer, and in destination-based tourism. Guidance on assisting the expansion of existing, and of creating new, developments are provided in this document.

2.2 TOURISM PROFILE

2.2.1 TOURISM FACILITIES

In conjunction with this Tourism Opportunity Study, an inventory of tourism facilities has been prepared (by Clover Point Cartographics Ltd.). The inventory was completed in November 2000 and updates information that was first collected in the mid 1990s. The inventory was conducted by way of a locally administered survey which operators were asked to complete. Inclusion in the inventory was voluntary but appears to be reasonably comprehensive resulting in a fairly thorough inventory. Descriptive information is available for each facility included in the inventory and the following is a summary of facilities by type.

Table 2-2
Tourism Facility Type

Accommodation	Number	Attractions	Number
Hotels	9	Museum	2
Motels	14	Arts/Culture/Heritage	28
RV/Campgrounds	10		
Lodge/Resorts	13	Industry	1
Camps	4	Golf	2
Huts/Cabins	1	Downhill Ski Facility	1
Cabins/Cottages	6	Cross Country Ski	3
Guest Ranches	2		
Bed and Breakfasts	7		
Other Accommodation	2		

Source: Tourism Opportunity Strategy (Phase 1 – Inventory Update), Clover Point Cartographics, Nov. 2000.

The Quesnel Region has a mix of accommodation types. The most common are motels, lodges/resorts and private campgrounds. Hotels and motels are located primarily in the City of Quesnel, while the other types are more common in the rural areas of the region. Although there has been one recent hotel development in Quesnel and at least two significant upgrades, most of the accommodation properties are older and of modest quality. They have been suitable for the historic commercial and outdoors oriented markets, but may not match today's more sophisticated adventure travellers' needs.

Attractions are heavily oriented to the arts/culture/heritage category. Nearly all of these are located in either Wells or Barkerville and include the tourist-oriented retail and service businesses that operate in heritage buildings. Barkerville is by far the most significant built attraction, and is the largest heritage restoration project in BC.

The figures tallied in Table 2-2 above represent actual facilities by category. It indicates that the region has a reasonable base of tourism accommodation but a much smaller inventory of attractions. This is significant as it is indicative of the composition of the region's tourism industry. That is, travellers can be accommodated adequately, but outside of Barkerville, there are few attractions to encourage people to either visit or stay in the region.

Another tally method is to categorize the range of tourism products and tours that are offered commercially in the region. Table 2-3 lists the number of operators that offer various kinds of outdoor products and tours.

Table 2-3
Tourism Products and Tours

Outdoor Products	Number	Tour Offerings	Number
Water-Based:		Guide-Outfitter	9
Boating (non-motorized)	5	River Rafting	1
Boating (motorized)	8	Marine Charters	4
Canoeing	11	Air Tours	2
Kayaking	2	Kayak/Canoe	7
Rafting	1	Bus/Van Tours	2
Fishing (general)	12	Hiking/Nature	7
Fishing (fly fishing)	2	Snowmobile	2
		Cycling	2
Snow-Based:		Horseback riding	4
Cross-Country Skiing	2	Ski Touring	1
Snow sports	2	Other	2
Ski Touring	1		
Snowmobiling	4		
Land-Based:			
Hiking/Backpacking	11		
Mountain biking	4		
Horseback riding	6		
Hunting	4		
Wildlife Viewing	5		

Source: Tourism Opportunity Strategy (Phase 1 – Inventory Update), Clover Point Cartographics, Nov. 2000.

It is noted that an outdoor tourism **product** is an activity that is offered commercially for which a fee is charged. Also, the tallies above are from the recently completed inventory, which is a reasonable representation of the products available, but as with any voluntary inventory, is not 100% complete. It is further noted that the products listed above are largely delivered by businesses and operators who reside in the region. There are likely other operators who operate in the region but are based elsewhere.

In terms of outdoor products, the Quesnel region offers a range of land/snow/water-based products. Over 40 water-based products are provided with the most common being fishing and canoeing. Land-based products total 30 individual offerings and range from hiking to wildlife viewing with hiking/backpacking being the single most popular activity. Snow-based products are less common (a total of nine offerings) and range from cross-country skiing to snowmobiling.

Is spite of this broad range of products, it is important to recognize that the majority of these are small-scale, part-time, and seasonal operations. Most are owner-operators with a small number of part-time staff. However, based on this analysis the top three most popular adventure tourism products are fishing, canoeing and backpacking.

2.2.2 TOURISM ACTIVITY AREAS

Also in conjunction with this Tourism Opportunity Study, an inventory of tourism activities has been prepared (by Clover Point Cartographics Ltd.). This inventory was completed in November 2000 and updates information that was first collected in the mid 1990s. **Activities** differ from products in that they are based solely on the resource and do not depend on commercial use. They relate solely to the suitability of the resources or landscape features for various kinds of recreation.

The tallies below are based on a combination of mapped point and area information. The inventory was conducted using a number of published sources, and on information provided by knowledgeable local persons. The following table lists the kinds of features found in the region.

Table 2-4
Tourism Activity Areas based on Recreational Features

Activities	Number	Activities	Number
Water-Based:		*Land-Based:*	
Water Sports - General	33	Hiking/Backpacking	30
Beach Activities	3	Mountain biking	5
Boating (non-motorized)	8	Mineral Panning	12
Canoeing	55	Horseback riding	13
Kayaking	3	Scenic Viewing	40
Rafting	12	Wildlife Viewing	20
Swimming/Beach Activities	16	Cultural/Historical	109
Fishing - General	152		
Snow Based:		*Camping Activities:*	
Cross-Country Skiing	15	Camping -General	120
Dog Sledding	1	Cabins/Huts	20
Downhill Skiing	1		
Ski Touring	6		
Snowmobiling	10		

Source: Tourism Opportunity Strategy (Phase 1 – Inventory Update Database file), Clover Point Cartographics, Nov. 2000.

The table indicates that the region has a large range of resources, which can support a diverse number of recreational activities. This tally is solely a quantitative inventory of the number of areas or sites where specific activities could occur. Details on resource quality are not available, but generally the area is known for its moderate to high quality resources. The most notable resources are the Bowron Lake canoe route in the east, and fly fishing locations in the west. Based on this tally, the most widespread opportunities are for fishing, camping, and cultural/historical activities.

2.2.3 TOURISM PERFORMANCE

Due to the number and variety of businesses involved in the tourism industry, reliable measures of tourism performance are scarce. Consequently the industry relies on indicators of activity in various components of tourism such as accommodation room revenue, park attendance, and highway traffic counts.

To measure visitor characteristics, the most current statistics are from the 1995 BC Visitor Study for the Cariboo Tourism Region. Although this information is dated, it is thorough and covers a full twelve-month period. It also is the only source for resident and non-resident travel at the regional level (although the Cariboo Tourism Region used in this study includes most of the Cariboo Regional District – an area much larger than the Quesnel TOS study area). However, the tourism industry appears (based on subjective information) to have performed reasonably well through the 1990s. The following are selected measures of tourism performance.

- **Visitor Volumes and Characteristics** (Source: BC Visitor Study – Cariboo Region)

- **Visitor Totals:** Approximately 1.7 million persons visited the Cariboo Region in 1995. This figure included 1,040,000 BC residents and 684,000 non-residents. About 6% of all visitors to and within the province visited the Cariboo Region.

- **Tourism Revenue:** These visitors spent a total of nearly $200 million dollars, including $133 million by residents and $65 million by non-residents – about 2% of total provincial spending.

- **Tourist Spending:** Residents spent about $40 per day and $128 per stay, while non-residents spent about $36 per day and $95 per stay in the region.

- **Length of Stay:** Residents stayed 3.6 days in the region while non-residents stayed 2.6 days.

- **Origin:** BC residents tended to be from the Lower Mainland (37%) and the South (33%). Non-residents were from nearby provinces (31%) and nearby states (28%). Long haul US residents represented 15% of the non-resident total while Europe made up another 14%.

- **Purpose of Trip:** Visiting friends and relatives was the primary trip purpose for 41% of residents and 31% of non-residents. Outdoor activities were popular with both groups at 29% and 23%, respectively.

- **Visitor Characteristics:** BC Residents tended to be slightly younger (44 years vs. 46 years), slightly less well educated (55% with some post-secondary education vs. 77%) and slightly less well off (38% earning under $40,000 annually vs. 26%) than non-residents.

- **Destination within the Cariboo Region:** Of all visitors to the Cariboo Region, 23% of residents and 35% of non-residents visited the study area (Cariboo North)

- **Seasonality:** Tourists visit the region in all seasons:

Season	Resident	Non-Resident
Spring	14%	12%
Summer	58%	71%
Fall	9%	8%
Winter	18%	9%

- **Tourism Room Revenue** (Source: BC Stats - Room Revenue Report)

Tourism Room Revenue figures are based on the 8% accommodation tax collected on roofed tourism accommodation. The figures represent the Cariboo Regional District and include all commercial accommodations of more than three units. The figures indicate a modest increase in properties and rooms throughout the 1990s. Room revenue (in current inflated dollars) has increased steadily for much of the 1990s but tailed off in 1998. This represents a modest increase in room revenue through much of the 1990s, some of which would have been increased room rates rather than increased occupancy.

Year	Properties	Rooms	Revenue ($,000)
1992	132	2,076	$11,415
1993	137	2,069	$12,910
1994	141	2,057	$14,036
1995	135	2,000	$15,882
1996	144	2,196	$15,758
1997	146	2,173	$16,166
1998	142	2,192	$15,304

- **Tourism Facility Use**

Other than accommodation, little information exists on the performance of the tourism industry in the Quesnel region. However, the few operators that responded to the question on "use" indicated that their business is highly seasonal, with usage reasonably good in the summer and much less busy in the spring and fall. No information was available on winter products.

- **Highway Traffic**

The Ministry of Transportation and Highways monitors traffic flows on Highway 97 through the study area. We have selected monitoring stations at both ends of the study area to reduce the effects of local traffic around Quesnel. The following table represents summer average annual daily traffic.

Year	5.5km south of Stone Creek	1.8km north of Marguerite
1994	4954	4600
1995	5004	4500
1996	4995	4600
1997	5040	4600
1998	5040	4450

- **Summary of Tourism Performance Factors**

Tourism is a significant component of the regional economy and appears to have remained reasonably stable through the 1990s. According to the Visitor Survey, approximately 480,000 travellers visited the North Cariboo (the Quesnel TOS study area). This figure is comprised of 240,000 residents and an equal number of non-residents. This is a significant number of persons and represents nearly 1.5 million person-days.

The main reasons people visit the area are to see friends and relatives, and to pursue outdoor activities. Both of these trip purposes mesh with the adventure tourism focus of this report. A broader range of commercial outdoor and cultural could be attractive to both of these traditionally strong market segments. This information does not incorporate new markets that could be encouraged to visit the region based on new product developments.

2.3 TOURISM ADMINISTRATION

Due to the size, scope and diversity of tourism, there are a number of agencies that are involved with various facets of tourism administration. For analytical purposes, these agencies have been grouped into the following categories:

- Local and regional tourism and economic development organizations
- Resource and regulatory agencies (grouped into provincial, crown corporation, federal and regional)
- Tourism programs

2.3.1 LOCAL AND REGIONAL TOURISM AND ECONOMIC DEVELOPMENT ORGANIZATIONS

A number of agencies and organizations have a role in the planning, marketing and regulating the industry. The most significant of these agencies, and their mandates as they affect tourism, are as follows (in alphabetical order):

- **Cariboo-Chilcotin Coast Tourism Association (CCCTA)**

The Cariboo-Chilcotin-Coast Tourism Association is a Destination Marketing Organization based in Williams Lake and serving the area from Hixon to Lillooet and from Wells-Barkerville to Bella Coola. Its mandate is to promote and protect tourism and foster its positive growth. It provides its members with cooperative marketing opportunities based on product-type, represents members at major travel shows, and lobbies government and other agencies on behalf of its members. Given the range of adventure products in the Tourist Region, there is a direct link between this Association and the Quesnel TOS. However, their mandate is heavily focused on marketing, and their ability to get involved with tourism development is limited.

- **Community Futures Development Corporation (CFDC)**

Community Futures is a community owned and governed development corporation, committed to the development of a sustainable and diversified economy in the North Cariboo region. Activities include:

- identifying and supporting initiatives to diversify the local economy,
- information resources and counselling support for small business,
- financial assistance for small business,
- the development of entrepreneurial skills and values
- providing services to existing and potential operators
- providing information on specific opportunities
- specific business training.

Tourism businesses (both expansions and new projects) would qualify for assistance in terms of skills development, business planning, and loans for appropriate businesses. Specific loan programs exist for youth entrepreneurs, and persons with disabilities, both of which could have application to adventure/cultural tourism developments.

- **Island Mountain Arts (IMA)**

Although primarily a cultural organization that operates a gallery and school, IMA has also provided programs that have contributed to the development of the cultural sector. They have organized conferences and workshops to assist artists in developing their businesses as well as research to develop the wood industry and the artisan-based value-added woodworking sector.

- **Nazko Community**

The community of Nazko has recently created a partnership between the Nazko Community Association, the Nazko Band Government, School District 28 and Human Resources Development Canada to develop a community centre. The Centre intends to offer programming that will increase visits to the Nazko Valley, based on cultural tourism focusing on the area's history and natural setting.

- **Quesnel Community and Economic Development Corporation (QCEDC)**

The mandate of the QCEDC is development of the local economy by working with existing business to grow, expand and develop and by attracting new businesses, entrepreneurs and investment to the area. It strives to build the capacity for long term planning in the tourism sector, develop tourism infrastructure that will enhance the destination appeal of Quesnel, and help coordinate marketing and program development. Its geographic coverage is the City of Quesnel and the District (The "District" is meant to cover the greater Quesnel area but does not include Wells or Nazko).

- **Quesnel and District Chamber of Commerce**

The Chamber of Commerce is a member driven business organization whose mandate is to undertake those programs that will effectively promote Quesnel and District to improve trade, commerce and the welfare of its citizens. Tourism is a focus of the Quesnel Chamber and they participate in marketing initiatives such as the North Cariboo Marketing Strategy on behalf of their members. They had a major involvement in the recent BC Winter Games and annually stage Billy Barker Days – a four day community and tourism festival.

- **Quesnel Tourism Information Centre (TIC)**

The City of Quesnel operates a year round tourism information centre in the Quesnel Museum and Archives. Located in LeBourdias Park, this high profile site is one of the main points of contact with visitors to the North Cariboo. (It is noted that during the course of this analysis, operation and management of the TIC has been taken over by the QCEDC.)

- **Wells and District Chamber of Commerce**

This organization has a membership of business from Wells, Barkerville and Bowron Lake. It produces brochures marketing the area, promotes SuperHost training, and is currently developing a 'portal' website for the area. Wells is also one of the original three (and current six) "Gateway" communities in the province. The Gateway program is an extension of the Ministry of Small Business, Tourism and Culture's larger ecotourism and adventure travel strategy established in 1999, and supports the governments green economy initiative. The program provides financial assistance to allow these communities to identify local and regional tourism assets and projects that will promote ecotourism. Wells is implementing their business plan which focuses on culture and adventure tourism initiatives.

- **First Nations Bands**

At the outset of the study, contacts were made with the First Nations bands in the study area to explain the project and encourage their participation. None of the bands were interested in participating in the project. It is noted, however, that adventure tourism represents a significant opportunity for First Nations in terms of business and economic development.

2.3.2 RESOURCE/REGULATORY AGENCIES

There are several agencies that are involved in land management issues that affect land-based tourism. These agencies have a particularly significant impact on adventure tourism in the areas of access, tenure and regulation. The agencies that have the most direct impact on tourism development – and the scope of their jurisdiction – are as follows (Sources: Agency websites and, Adventure Tourism Handbook (Draft), , and The Williams Lake Forest District Tourism Opportunity Strategy, 2001)

Provincial Agencies:

- **BC Parks (MELP)**

BC Parks is a branch of the Ministry of the Environment, Lands and Parks (MELP). Under the *Parks Act*, BC Parks "is responsible for designation, management, and conservation of a system of ecological reserves, protected parks, and recreation areas located throughout the province" (http://wlapwww.gov.bc.ca/bcparks/). In managing these areas, BC Parks provides a number of tourism-related programs and products for the inspiration, use and enjoyment of the public. Such programs fall under the categories of conservation, outdoor recreation and education/interpretation.

BC Parks permits appropriate commercial recreation tourism activities within Provincial Parks. (An appropriate activity is one that traditionally occurred in the park and/or is deemed compatible with BC Parks' values.) Commercial activity is intended to provide the public with the opportunity to appreciate the natural and cultural heritage of the parks. Although guidelines vary, all private sector services must be consistent with the objectives of the park as outlined in their management plan. However, the four new protected areas designated in the Land Use Plan do not yet have completed management plans.

Many areas within protected areas are available for commercial recreation. Private sector involvement in BC Parks may be via invitation if it is to supply exclusive services, or a proponent may submit an unsolicited proposal. BC Parks will assess the merits of the proposal based on consideration of the type of activity, its size and location, the anticipated impacts on BC Parks and on other agencies, the effects on similar operations in or near the park, and compatibility with the management plan.

For commercial operations in new parks, BC Parks uses the announcement date of the Cariboo Chilcotin Land Use Plan (CCLUP) of October 24, 1994 as the effective date. Proponents claiming pre-existing operating rights need to demonstrate that they were operating prior to that date.

- **Wildlife Branch (MELP)**

The number of wildlife species, habitats and ecosystems inherent to BC are key resources for the tourism industry. Under the *Wildlife Act*, the Wildlife Branch is responsible for managing and conserving BC's native species and habitats, providing the public with opportunities to use and enjoy wildlife, and balancing wildlife needs with human activity. Such responsibilities are carried out via three main program areas consisting of biodiversity conservation, wildlife management and extension. The key wildlife issue in the study area relate to caribou. This includes Woodland Caribou issues in Itcha Ilgachuz ranges and Mountain Caribou in the Bowron Lake area.

- **BC Fisheries (MAFF)**

BC Fisheries is part of the Ministry of Agriculture, Food and Fisheries (MAFF) and leads the provincial government's efforts to build and sustain diverse and healthy native fish populations, and to develop and diversify the fisheries and aquaculture sector. British Columbia exercises delegated authority for the management of the non-salmon freshwater fisheries - with responsibility shared between BC Fisheries and the Ministry of Environment, Lands and Parks - and regulates fish buying, vending and processing activities, aquaculture business and aquatic plants. The federal government - Fisheries and Oceans Canada (DFO) - regulates both the commercial and recreational tidal water fisheries.

A key role that BC Fisheries plays in the tourism industry is the preservation, management, and development of sport recreational fishing and harvesting activities. The province is currently conducting a review of the Angling Guide Management System and Classified Waters. The aim of the review is to evaluate government's role in managing the freshwater guiding industry and angler effort on B.C.'s special waters and develop ways to improve and enhance the system.
BC Fisheries is also working on a Fisheries Strategy which is setting a vision for freshwater fishing, including the sports commercial sector. It is also defining the role of the various government agencies for the recreational angler and sports fishing businesses.

- **Forest District Offices (MOF)**

Public recreation in BC's forests falls under the responsibility of the Forest Service. In doing this, the Forest Practices Branch, in conjunction with forest district offices, provides recreational opportunities; carries out inventory and mapping studies related to visual and recreation resources; monitors recreation related procedures and the health of recreation resources; manages a network of recreation sites and trails; and provides the public with relevant recreation related information.

The Quesnel Forest District has recently (1998) completed Recreation Plans for both the east (Cottonwood East) and west (Quesnel West) portions of the District. These detailed plans describe the key recreational issues and management priorities within each area. Specific analysis is devoted to commercial backcountry recreation opportunities (which have been included in this TOS report). These reports are available from the Ministry of Forests Office in Quesnel.

- **British Columbia Assets and Lands (BCAL)**

The Land Management Division, in conjunction with the Crown Lands Branch of MELP, jointly administers the *Land Act* and is responsible for the delivery of a wide variety of Crown Lands programs and policies, ranging from residential development to commercial recreation use. Its mandate is to make crown land available for economic growth and public benefit.

The Division's main relationship with the tourism industry arises with respect to the delivery of programs and policies related to the use of Crown land for tourism purposes. Since late 1998, BCAL has been responsible for managing commercial recreation and development opportunities. BCAL is responsible for administration of the Commercial Recreation on Crown Land Policy, approved May 1998. The stated vision of this policy is to create "an environment that is naturally diverse and healthy, and enriches people's lives".

The policy is described in a 37-page report available from the Ministry of Environment, Lands and Parks. It provides details on applicant eligibility, investigative use permits, temporary use permits, license of occupation, and leases. It also deals with tourism land use planning issues, adjudication of applications, issuing of tenures, and monitoring.

The policy applies to all forms of outdoor recreation activities to be carried out on provincial Crown land on a fee-for-service basis. The policy does not apply to operations using Crown land for less than 14 days in a six month period, and makes no modifications to the landscape, and does not use motorized equipment, and does not use livestock or bicycles other than on designated trail systems.

The strategic principles guiding implementation of this policy are:

- Protecting and maintaining environmental integrity
- Maintaining public access and use
- Ensure that new applications are compatible with existing businesses
- Provide for environmentally sustainable commercial recreation
- Involve the public interests through a consultative process
- Involve other land use agencies in the reviews
- Provide economic development opportunities for First Nations
- Ensure compatibility with land use planning initiatives

The policy is intended to reduce land based recreation conflicts and to provide commercial operators with greater certainty about their rights. For each type of permit, information is provided on the rights granted, applicability, term, pricing, requirements and responsibilities, referrals and advertising, tenure replacement and sub-tenuring. This is an important document and prospective adventure tourism operators are encouraged to obtain it.

- **Tourism Policy and Land Use Branch (MSBTC)**

The Ministry of Small Business, Tourism & Culture (MSBTC) is responsible for promoting the province's tourism, small business and cultural development. Through its various Branches, the Ministry works to promote tourism and cultural development and expansion by representing the tourism/cultural sector in land use planning, government policy development and government economic development initiatives. The Tourism Policy and Land Use Branch encourages tourism expansion through a variety of initiatives, including implementation of the Ministry's provincial ecotourism strategy.

- **Cultural Services Branch (MSBTC)**

BC's extremely diverse culture is a significant contributor to the tourism industry and attracts millions of visitors to the Province's museums, art galleries, cultural events and festivals, theatre productions, and cultural villages. The Cultural Services Branch administers a number of programs which support the development and promotion of the cultural industry sector. Such programs provide the industry with operating and project assistance, travel assistance, tax credits, and financial support. The Branch also provides management for the BC Arts Council and the BC Cultural Foundation. The Branch operates Cottonwood House and Barkerville in the study area.

The Heritage Conservation Branch and the BC Heritage Trust administer projects that support the preservation of the provinces heritage resources, including financial assistance to the planning and implementation of capital heritage restoration projects.

Crown Corporations

- **Tourism British Columbia**

Tourism BC is the province's tourism marketing agency. It conducts advertising, public relations, familiarization tours and trade shows, and produces a number of marketing publications. The agency maintains the 1-800 reservation and information system and supports a network of Information Centres. It also conducts market and industry performance research, tourism product analysis, SuperHost training, and accommodation inspections. In addition to these services, other activities in the Quesnel region include the annual "Road Show" dealing with marketing and development issues, and the Tourism Indicators publication, which documents periodic tourism performance. Tourism BC also works with its affiliate regional associations to create packages and market the regions.

- **BC Rail**

The leading commercial service providing access to the provincial destinations by rail is the BC Rail Crown Corporation. BC Rail is Canada's fourth largest railway service and comprises a total of five passenger train services. These passenger trains service a number of communities, between Prince George and Vancouver.. Stops at Quesnel are scheduled for the passenger service and for the tourist excursion – the Cariboo Prospector. However, the Whistler Northwind excursion does not stop in Quesnel. BC Rail also provides interline connections to all rail-served points in North America.

- **Forest Renewal BC**

BC's forests provide extensive opportunities for the tourism industry and occupy a large portion of the Province's land base. FRBC is an investment agency which supports the renewal of forest resources. Investments are categorized within the areas of communities and workforce, value added, and forest environment and land-based activities.

- **PavCo**

The Pavillion Corporation (PavCo) serves as BC's leader in the meeting and events industry through the operation and management of five public and event tourism facilities: BC Place Stadium, Robson Square, Bridge Studios, Tradex and the Vancouver Convention and Exhibition Centre. The Corporation also provides third party advice in regards to the management of tourism related facilities, specifically with respect to marketing, operations and human resources. PavCo has recently been contracted to assess the market opportunities for catering to regional meetings, conferences and conventions in Quesnel.

Federal Agencies

- **Human Resources Development Corporation (HRDC)**

HRDC's main objective is to "enhance employment, encourage equality and promote social security". The tourism industry falls under the umbrella of many of the agency's programs, including: Grants and Contributions, Income Support, Services to Employers and Entrepreneurs, and Work and Job Access. The Quesnel Human Resource Centre has been involved in a number of tourism related initiatives through their Job Creation Partnership Program (EI top-up) including the Quesnel Antique Machinery Park, the development of the new Wells Museum, the Nazko Community Centre, and the restoration of the Wells Community Hall. In addition many attractions and tourism operators use the Summer Career Placement program which provides wage subsidies for hiring students.

Recent changes to HRDC policy may affect the usefulness of their programs to the tourism industry. The Labour Market Partnership Program which had previously been used to fund research and capacity building that contributed to long-term job creation can now only by used of very focused labour market research. There is currently one project in the region that is peripherally related to tourism – a study of the cultural labour force in the region and its needs.

Regional Agencies

- **Cariboo Regional District**

Regional district government is responsible for administering regional services, controls, and regulations for residents. Services of the Cariboo Regional District include land development, economic development, fire protection and libraries. Services having a tourism implication include regional parks and recreation, recreation facilities, and land use planning.

- **City of Quesnel and District of Wells**

Municipal governments are responsible for administering civic services for residents. Services and regulations affecting tourism development include land use planning, zoning, taxation and economic development services.

2.3.3 ECONOMIC DEVELOPMENT AND TOURISM PROGRAMS

In addition to the organizations and agencies listed above, there are other groups or programs that have a role in tourism.

- **Cariboo Economic Action Forum (CEAF)**

This group of economic stakeholders came together after the completion of the Cariboo-Chilcotin Land Use Plan to "improve the region's social and economic status by aiding the development of healthier communities, strong businesses in all sectors of the economy and good livelihoods for all residents". CEAF works to fulfill that mission by striving to increase private and public investment in the region, encouraging sustainable and effective use of resources, and expanding Cariboo-Chilcotin influence over private and public policies and programs that affect development of the region.

Tourism, in particular cultural tourism, has been identified as a CEAF priority through their annual stakeholders conference. CEAF also administers the BC Community Enterprise Program (Ministry of Community Development, Cooperatives and Volunteers) within the Region. Projects are funded based on the priorities within the CEAF work plan of which tourism is one. Tourism-related projects supported to date include:

- Clinton to Wells Snowmobile Trail pilot project
- Flying Horse Gallery (Horsefly) development
- Wells Community Hall Restoration
- Arts/Adventure Learning Vacations pilot study
- Wells Woodworking School pilot study

In addition, CEAF lobbies on issues that may be blocking sector development. CEAF was instrumental in having the Bella Coola ferry restored and in having telephone service extended to Nazko. Transportation issues as identified by the tourism industry is a current topic for the May 2001 Stakeholders' Meeting.

- **Gold Rush Trail Development Cooperative**

This initiative draws together tourism operators from New Westminster to Barkerville and Prince George in a common marketing effort to gain recognition for the original 'Gold Rush Trail' as an auto-touring destination similar to the Alaska Highway. The group has incorporated as a legal cooperative and pooled marketing money to implement a marketing strategy that was completed in 1999. To date they have published a guidebook – 'The Gold Rush Journal' – which will be an annual publication, implemented a print media campaign, designed pins, posters and other promotional material to increase the profile of the route. They have also developed an image bank for use by members.

- **North Cariboo Cooperative Marketing Strategy**

This marketing effort brings together Quesnel, Wells-Barkerville-Bowron Lake and Nazko to gain recognition for the North Cariboo as an attractive destination. The Quesnel Community and Economic Development Corporation now coordinates this initiative. To date the group has created a new trade show booth and participated in several travel shows, developed graphic material and implemented a print media campaign,

2.4 SUMMARY OF FACTORS AFFECTING TOURISM DEVELOPMENT

The area has a broad and diverse inventory of resources on which to base tourism development. This includes three distinct geographic regions of the Interior Plateau – the Fraser Plateau in the west, the Fraser Basin in the central portion, and the Quesnel Highlands in the east. The region has a climate conducive to four-season tourism, the province's most famous river (the Fraser River), two regionally significant rivers (the Blackwater and Quesnel Rivers), numerous productive fish lakes, and a rich heritage.

The region is heavily dependent on forestry although tourism has a solid base and offers good prospects to expand and diversify the economy. The adventure tourism and culture components of tourism are the focus of this analysis and the region is well represented in these areas. The region has the province's largest heritage attraction (Barkerville), and an internationally famous remote canoe route (Bowron Lake chain).

The region has a mix of accommodation types and a variety of attractions. Accommodations include hotels, motels, lodges and campgrounds. Attractions are heavily oriented towards heritage-type amenities. The top three most popular adventure tourism activities are fishing, canoeing and backpacking.

Tourism in the region is driven by three categories of visitors. These include pass-through traffic, destination visitors, and persons visiting friends and relatives. The pass-through market is the highway-oriented vehicle traffic travelling north and south on Highway 97. The destination visitors are those persons fishing at the fly-in and road accessed lodges, canoeing in Bowron Lake Park, taking ranch vacations, and visiting Barkerville. Persons visiting their friends and relatives are concentrated in the key population centre of Quesnel.

Summer generates about two-thirds of tourism business, while spring and winter account for about 15% each. There are no comprehensive measures of tourism performance, however, there has been an increase in the number of accommodation properties and resulting room revenue. Overall, tourism appears to have performed reasonably well over the last decade.

Numerous organizations and agencies are involved in the management and administration of tourism. The key local agencies expected to have a role in advancing adventure tourism in the region are Quesnel Community and Economic Development Corporation, and the Community Futures Development Corporation. The QCEDC could be the lead agency in delivering or implementing the action plan recommendations of this report. CFDC could provide financial assistance on a project basis as allowed by their program guidelines.

The Cariboo-Chilcotin-Coast Tourist Association could assist in cooperative marketing and package development, while the Chamber of Commerce would represent the interests of new adventure tourism businesses.

In terms of Nazko, the three agencies developing the Community Centre would be logical bodies to further the implementation of adventure tourism in the west portion of the study area. Determining local priorities and assisting with the approval process are two key actions. In Wells the Gateway program is the key vehicle to promote and develop more adventure product, and to expand the market.

With the exception of CFDC, no agency has the mandate to help fund actual commercial developments. This is a shortcoming as many adventure products start as one-person businesses, based on the interest, knowledge and desire of the proponent.

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3.0 NORTH CARIBOO ANALYSIS

3.1 BACKGROUND

3.1.1 FOCUS OF THE ANALYSIS

The tourism industry encompasses a number of different sectors. These include:

– Accommodation	Hotels, Motels, Resorts, Lodges and Campgrounds
– Adventure Products	Land, Water and Snow-Based Activities
– Attractions	Commercial (Private) and Heritage (Public)
– Services	Information Centres, Restaurants, Retail outlets, and Convention Centres
– Transportation	Marine, Air, Rail and Road

The focus of this TOS analysis is on the rural (or non-urban) component of accommodation, all forms of adventure tourism, and on non-aboriginal cultural/heritage attractions.

The tourism industry is one of the fastest growing economic sectors in the world economy. In BC, tourism is already the province's second largest industry (as measured by gross domestic product) - generating $9.2 billion in revenues with some 16,700 tourism-related businesses employing over 113,000 BC workers (making tourism the fifth largest employer). (Source: Tourism BC.) The difference between tourism's high GDP rank and lower employment reflects the high proportion of part-time employment in the tourism industry.

As an economic sector, tourism tends to follow the general business cycle and growth has been modest during much of the 1990s. Tourism BC is forecasting somewhat improved growth into 2001, although worries continue about the slowing Canadian and American economies. In addition to the health of economies in the BC market areas, concern also exists about ongoing airline restructuring and fuel prices. The British Columbia's economy is expected to improve providing an opportunity for domestic tourism growth.

With an ageing population generally, the continued dominance of the baby boom generation, and the added growth of the echo boom group, demand for travel will continue. Activity based travel for such experiences as adventure, culture, education and wellness are expected to grow. Within the activity category 'ecotourism' and 'adventure travel' are expected to continue the solid growth they demonstrated during the 1990s.

BC boasts outstanding scenery; a wide diversity of natural resources; and relative to many parts of the world – considerable areas of wilderness. These attributes are key to BC's advantage in developing an international reputation as an adventure tourism destination.

However, the same land base that offers opportunities for tourism, also supports a wide variety of other resource users. With expanding economic activity, increasing populations and the subsequent increasing demand on public lands, the potential for resource use conflicts and environmental damage is heightened.

BC has spent the last several years conducting various land and resource management planning processes (including the Cariboo-Chilcotin Land Use Plan). These processes have identified new protected areas and provided direction for future natural resource management through land zonation and development guidelines. While these land use planning processes have provided a foundation, resource managers still face a considerable challenge in meeting the public's demand for multiple-use, economic development, and the sustainable management of all natural resources on provincial crown lands.

3.1.2 DESCRIPTION OF PREVIOUS TOURISM RESEARCH

A considerable amount of tourism research and planning has been conducted in the Quesnel study area over the last decade. The list of sources used in this analysis includes approximately 40 reports, about half of which are specific to the study area. These reports cover a range of tourism topics including:

- Trails and trail development
- Backcountry/ adventure tourism/ eco-tourism recreation opportunities
- Tourism markets and marketing
- Visitor surveys and profiles
- Recreation resources

The reports of direct relevance to this TOS are the strategies and proposed development plans. In an attempt to avoid the pitfall that affects many strategies in that they do not generate action or get implemented, a summary of the key reports and their results is provided, by category.

- **Trails and Trail Development**

The North Cariboo has a large number and a diverse mix of trails. Over the last two decades a number of trail reports, plans and strategies have been prepared. Some of these have included:

- *Alexander Mackenzie Heritage Trail: Master Development Plan (1985)*
  This plan guides MoF and BCAL decisions in regard to appropriate management along the trail, including public and commercial recreation. Any new proposals that make use of the trail would need to conform to the management objectives.

- *Strategy for the Development of the Cariboo Section of the Gold Rush Trail (1987)*
  This original strategy was never fully implemented, but in 1999 the concept was revived and the work continued by the Gold Rush Trail Development Corporation. A new marketing plan was developed by Currie Andrews Communications.

- *Goat River Recreational Trail Pre-Feasibility Study (1992)*
  This study assessed the recreational potential of the Goat River. The mapping and hazard evaluation information is still relevant. The historic trail has subsequently been restored and there continues to be discussion on a proposed snowmobile route.

- *The Cariboo Commercial Recreation Opportunities Study (1992)*
  This was a broad brush study which identified potential areas with high recreation values. Although this information has for the most part been incorporated into subsequent studies, it provides valuable background information.

- *Economic Opportunities for Cross-Country Skiing: Quesnel, Wells-Barkerville Area* (1993)
  This report was completed by the Cariboo Ski Touring Club and has formed the basis of their

development of public recreation facilities in the Mount Murray and Moncton Bowl areas. The background information remains valuable.

- *The Wells Trailhead Project: The Goldfields Trail Network (1993)*
  The study includes a complete inventory of the trail network in the Wells-Barkerville-Bowron Lake area, information that remains useful. It has formed the basis of the work done by the Wells and Area Trails Society to develop the trail network. It is a good reference to convey the number and nature of trails in the area.

- *Cariboo-Chilcotin-Coast Trails Regional Concept Plan Outline (1994)*
  This regional concept plan was developed in an effort to coordinate trail development on a regional level. Although this exercise was useful, it was found that the implementation of the trail system would be very site specific. This document remains useful to demonstrate how the individual trail networks may be linked.

- *North Cariboo Trails Association Five-Year Action Plan (1994)*
  Although the North Cariboo Trails Association is now defunct, much of the work to be undertaken in the action plan has been completed by the Wells and Area Trails Society.

Although significant progress has been made on trail development as noted above, a few of these plans have not been fully implemented. This has occurred for one or more of the following for one or more of the following reasons:

- Lack of jurisdictional control
- Unclear responsibility regarding development and maintenance
- Lack of funds to develop trails
- Lack of funds to maintain trails
- Conflicts between motorized and non-motorized users
- Conflicts between recreational and commercial users
- Lack of trails of international caliber
- Burn-out by the club representatives and volunteers
- Resistance by users to user-fees
- Low carrying capacity for a wilderness experience
- Alterations to the viewscapes by logging.

In spite of this list of factors affecting implementation, the most significant reasons are lack of resources to develop and maintain public trail systems, and the questionable payback from a tourism revenue perspective. This payback issue is very difficult to measure but is based on the notion that the trail is the reason, or provides the incentive, to visit the region, while revenues accrue to the service sector (accommodations, restaurants, entertainment, etc.)

- **Opportunity Studies**

A particularly interesting and detailed analysis of the area (and the rest of the province) was conducted two decades ago (1980) under the federal/provincial Tourism Industry Development Subsidiary Agreement (TIDSA). This report included a thorough analysis of tourism resources and markets, and made a number of recommendations on how to improve tourism in the region.

For comparative purposes, we have reviewed this analysis and the opportunities identified. The following is a description of these recommendations with a summary of how the region has progressed in addressing the tourism development opportunities. (It is important to note that this TIDSA report was intended to be a strategy to guide tourism development but no agency was charged with implementation and no concerted development program occurred.)

Table 3-1
Tourism Development Progress

Planning/Operations	Progress on Recommendations
Establish area as a Regional Destination Area	Destination area strategies and designation were never implemented However the Wells-Barkerville-Bowron Lake area have made strides through cooperative marketing in developing recognition as a destination.
Extend Barkerville operational season	Some improvement made with earlier Spring openings and later fall closing for the interpreted programs. Barkerville (the town) is open year-round
Investigate a road link between Barkerville and Highway 16	This has not been done, but a link has been developed to the south linking Barkerville to Likely. The link to Highway 16 is not considered feasible at this time, except perhaps north through the Bowron River to Purden, 40 miles east of PG.
Develop theme signage	A network of themed information and interpretive signs has been developed along Highway 26. The same design is also used for large informational signs in Quesnel, Wells and Barkerville.
Establish a shuttle bus between Quesnel and Barkerville	Several false starts. Suffering from chicken/egg syndrome. Currently Gold Safari Tours offers a summer shuttle service but there is no scheduled service.
Support heritage conservation and restoration	Wells has focused on heritage themeing. Several key buildings have been restored.
Control growth in Wells via OCP	Wells adopted its first Official Community Plan (OCP) in 1988. It was updated in 2000, after incorporation. (Controlling growth is NOT an issue at this time; attracting growth is)
Explore benefits of gaming	Wells Hotel is one of a limited number of commercial properties in the province with a gaming licence.
Create package trips	BC Rail has new excursion products, one of which stops in Quesnel (Cariboo Prospector).
Support the arts and craft industry	Island Mountain School of Arts at Wells provides professional instruction in the visual, literary and performing arts, as well as business services geared for the cultural sector. Although IMA is a major economic engine in the area, no core funding is available to subsidize its operations.
Development	
Expand food and accommodation	New and renovated hotels, motor inns and B&Bs have been developed. The number and variety of food establishments has improved.

Improve appearance of urban centres	Quesnel waterfront trails and Reid Street streetscape improvements. Upgrade of commercial properties in Wells.
Upgrade the BCR station in Quesnel	Some basic improvements made.
Develop a Fraser River paddle wheeler	No progress made.
Improve recreation opportunities	Establishment of several new provincial parks.

- **Tourism Markets and Visitor Surveys**

A few market research projects and visitor surveys have been done in the area. These are either provincial in scope, like the BC Visitor Survey which has Cariboo information, or surveys conducted in Wells/Barkerville. The last provincial scale visitor survey was conducted in the mid-1990s. Consequently, the information the tourism industry needs to document visitor volumes, expenditures and characteristics is dated.

The Wells research targets only on Wells' visitors and typically have had small sample sizes. Barkerville also conducts periodic user surveys which have been helpful in tracking the characteristics of visitors the historic site. BC Parks also has completed a number of visitor surveys of visitors to Bowron Lake Park.

Although not always statistically significant, the Barkerville and Wells visitor studies do provide valuable information about the numbers, demographics, and trip characteristics of the visitors to the Barkerville corridor. These figures would be useful to anyone contemplating a business opportunity in the area. Much of this visitor information has been compiled and summarized in two reports – Measuring Our Success and Measuring our Success II.

The Wells tourism survey produced the following results:

- Over 60 businesses in the Wells-Barkerville area are at least partially dependent on tourism. This represents a growth of 30% since the mid 1990s, and a 44% increase in employment.
- Accommodation capacity was 232 hotel/motel rooms and 35 B&Bs for a total of 267 rooms.
- Two-thirds of businesses are locally owned.
- Length of stay in the corridor was 2.7 nights, up from 1.3 nights a decade earlier.
- Length of stay in Barkerville was 5.2 hours
- Per diem spending was $69, with a length of stay of 4.2 days and a party size of 1.4 persons. (Source: Island Mountain Arts Case Study)

Similar visitor information is not available for the west side of the Forest District.

- **Recreation Resources**

The Ministry of Forests has completed two very comprehensive recreation plans for Quesnel Forest District entitled Cottonwood East and Cottonwood West. The vision statement states that recreation will be managed to recognize and protect recreation resources and to maintain and enhance recreation opportunities in cooperation with recreationalists and other resource users. The Key issues identified in these plans include:

East:
- Conflict between recreation user groups, particularly motorized and non-motorized
- Wildlife/recreation conflicts with Mountain Caribou
- Impact of forest recreation on heritage sites
- Commercial backcountry recreation versus public recreation
- Impact of resource extraction on viewscapes

West:
- Status of the Collins Telegraph Trail
- Historic trails that cross Indian reserves and/or private land
- Lakes management planning and Lakes Classification
- Public backcountry recreation versus commercial backcountry recreation
- Access and road development in the western portion of the District
- Wildlife/recreation conflicts with Mountain Caribou

The key policies recommended for action from these recreation plans that impact this TOS are as follows:

- Manage visual landscape/scenic quality along key rivers and trails, and around key lakes and tourism facilities.
- Develop access planning to maintain backcountry goals and consider wildlife values.
- Maintain and enhance opportunities for backcountry recreation (both public and commercial)

As these plans will guide MoF recreational activity in the area they remain important documents for future tourism development.

3.2 STRENGTH/WEAKNESSES/OPPORTUNITIES/THREATS (SWOT)

3.2.1 THE PROCESS

A SWOT Analysis is a business research technique used to assess development options. It focuses on the features and attributes of an area and defines their scope and merits. It identifies physical and economic factors that either help or hinder development of individual opportunities. The process provides a framework for conducting the opportunity analysis.

It is important to note that this SWOT analysis is focused exclusively on tourism development. That is, factors that may be a community or regional issue but do not relate directly to tourism development have not been included. The following is a description and definition of the four components of a SWOT analysis.

– Strengths	The features or attributes of the area that make it appealing to tourists. These are the physical strengths that could facilitate development of specific tourism developments. It also includes the social, administrative, infrastructure and community strengths.
– Weaknesses	The factors or conditions that hinder the development of tourism. Weaknesses include conflicts with existing use that range from incompatibility between tourism operators, between tourism and recreation, and between tourism and resource industries. It also includes any lack of community support, a lack of facilities or infrastructure, or a lack of natural features.
– Opportunities	The general and specific tourism developments that result from the assessment of strengths and weaknesses. These opportunities are based on resource capability, plus market and financial feasibility.
– Threats	Outside factors over which the agency or business has no control. These issues usually involve topics such as resource management and financing.

Our information has come from a number of sources. These sources primarily include background studies and observation of the analysts.

3.2.2 STRENGTHS

Table 3-2
Strengths

- **High Quality Natural Resources**

– **Variety of Resources**: The area has a large volume and variety of high quality natural resources. These resources include a combination of wilderness and scenery, and fish and wildlife resources. The quality of these physical resources ranges from regional and provincial significance (fishing and snowmobiling) to international significance (Alexander Mackenzie Heritage Trail and Bowron Lakes canoe route).

– **Wildlife:** The area has populations of a number of big game species. The list includes grizzly bear, black bear, mountain goat, California bighorn sheep, moose, elk, deer and caribou. In terms of birds, the area maintains populations of bald eagles, pelicans, trumpeter swans, grebes, loons, cranes and many species of owls.

– **Fish:** The area has an abundance of sports fish in a large number of lakes and rivers. Key sport species are salmon, trout and char. These fish resources support a high quality fly-fishing experience.

– **Wilderness:** The area provides high quality wilderness, particularly in the far eastern and far western portions of the study area. The roads to Nazko and Barkerville/Wells provide access to the semi-wilderness/midcountry areas to the west and east.

- **Several Significant Rivers**

– **Fraser River:** The Fraser River is the province's most dominant river and it bisects the Quesnel TOS study area. It is known for the salmon fishery, fur trade and gold rush history, wildlife viewing, rafting and canoeing. The river received a "high" recreation rating in a study done for the Ministry of Forests (Source: Preliminary List of Significant Rivers).

- **Blackwater (West Road) River:** Primarily known as the corridor of the historic Mackenzie route and First Nations grease trail, and for canoeing, fishing, hunting and wildlife viewing. It supports I – III river paddling grades suitable for novice to moderately skilled paddlers (soft adventure types).
- **Quesnel River**: This river drains Quesnel Lake and joins the Fraser River at Quesnel. It is just over 100 km long and supports paddling activities with class II – IV water. Other features include fish runs, gold rush history, and wildlife viewing.
- **Cottonwood River:** Known for its fish and wildlife populations, the lower canyon, Cottonwood House and gold rush history.
- **Nazko River:** Known for its fish and wildlife, collection of small lakes, canoeing and wildlife viewing.

- **Provincial Parks**

The region has one of the province's most unique and well-known wilderness parks – Bowron Lake Provincial Park. It also has a number of newly designated parks, the largest of which are Cariboo Mountains in the east and Itcha Ilgachuz in the west. It also has the province's largest heritage attraction – the restored gold rush town of Barkerville.

- **Bowron Lakes Provincial Park:** Bowron Lake Provincial Park in the Cariboo Mountains contains the world famous Bowron Lake canoe circuit. This 116 km chain of lakes, waterways and portages caters to over 5,000 canoeists annually. The park has 48 wilderness campsites, shelters and cabins, and reservations are required to ensure canoeists are spread out throughout the circuit.
- **Barkerville:** In the 1860s, Barkerville was reported to be the largest city in North America west of Chicago and north of San Francisco. Restoration of the town's buildings began in 1957 and today over 125 buildings have been restored. Barkerville Historic Park stages events in the Theatre Royal and has a program of street theatre. Barkerville is the largest heritage attraction in the province and caters to approximately 100,000 visitors annually, of whom about two-thirds are regional residents. Their research indicates that the length of stay has risen from about four hours to nearly one day over the last decade.

- **Community Infrastructure**

- **Quesnel**: Quesnel is by far the largest community in the region (estimated 2000 municipal population of 11,200 with an additional 3,000 to 4,000 in adjacent areas). It also acts as the service centre for the surrounding trading area. It has most of the necessary government agencies, personal services, and retail outlets.
- **Wells:** Wells is incorporated as a District Municipality and has a population of 270. It has a small retail, accommodation and services base, and has a strong artistic focus.

- **History**

- **First Nations Culture:** The First Nations peoples traditionally occupying the area encompassed by the Quesnel Forest District study area are the Dakelh people. They occupied territory from the headwaters of the Fraser River in the east to the Coast Mountains in the west. (Source: First Nations Peoples map)

- **Non-Native History:** The area has had a unique blend of resource development oriented history. These include exploration by Alexander Mackenzie in the late 1700s, development of the fur trade through the 1800s, the Collins Overland Telegraph line to Siberia in 1866 and the Yukon Telegraph Line to Quesnel in 1901. The most significant development, however was the discovery of gold in 1858 in the Cariboo and the subsequent development of Barkerville.

- **Location**

- **Centrally located:** Quesnel and the Quesnel study area are located close to the geographic center of the province, readily accessible from the north and south.

- **Climate**: The region has a four season climate with warm summers and cold, dry winters.

- **Transportation and Access**

- **Highway:** Highway 97 bisects the region from north to south providing access to and from the lower Mainland and Prince George. Highway 26 goes to Wells and Barkerville in the east, while paved road access exists to Nazko in the west. Literally hundreds of kilometers of forestry roads criss-cross the region.

- **Rail:** BC Rail operates two services through Quesnel. The Cariboo Prospector is the three time a week passenger service from North Vancouver to Prince George. The Whistler Northwind is a luxury three day excursion focusing on the nostalgic high-end rail service of 100 years ago. BC Rail also offer summer and winter rail tours including the Barkerville Gold Rush Tour.

- **Scheduled air service:** Air Canada provides scheduled air service to Vancouver three times a day. The Quesnel Airport is operated by the City of Quesnel.

3.2.3 WEAKNESSES

Table 3-3
Weaknesses

- **Transportation**

- **Highways**: Highway 97 is a two-lane road for most of its length in the study area, and can be slow and congested in summer. Repairs and maintenance are also an issue both summer and winter.

- **Rail:** The BC Rail excursions and packages pass through Quesnel, but the premier tour – the Whistler Northwind - does not stop in Quesnel.

- **Air Access:** Scheduled air access tends to be costly and there has been a general reduction in domestic capacity. Air Canada has recently reduced the number of flights to/from Vancouver from three to two a day.

- **Small Population Base**

- **Regional Population:** Quesnel is the only city in the region and contains most of the region's population. This concentration of population creates a centralizing of services.

- **Other population centers:** Wells is the only other incorporated jurisdiction in the study area and its population is small.

- **Tourism Issues**

- **Highly seasonal tourism market:** The area has a short traditional summer warm weather period due both to the northern latitude and the altitude. The long winter period also limits suitability of the area for travellers wanting a warm weather experience.

- **Small market base:** The pass-through market is limited to the north/southbound traffic on Highway 97. The destination market is focused on the outdoor/adventure products, arts and heritage.

- **Limited number of tourism facilities:** Quesnel has a mix of tourism facilities (accommodation and food and beverage) although many are oriented to the commercial traveller. There are few built, cultural facilities or tourism attractions.

- **Lack of visitor statistics:** Although not specific to the study area, the tourism industry is notoriously poor at measuring its performance. This limits the industry's ability to track its success and to monitor trends.

3.2.4 OPPORTUNITIES

Table 3-4 Opportunities
• **Opportunities by type** – **Land Based:** Tourism development opportunities having potential based on land resources include such activities as hiking, hunting, trail riding, and wildlife viewing. – **Snow Based**: Tourism development opportunities having potential based on snow resources are heli and cat skiing, cross-country skiing, ski touring, and snowmobiling. – **Water Based:** Tourism development opportunities having potential based on water resources are canoeing, kayaking, rafting, river touring, fishing and wildlife viewing.
• **Opportunities by market** – **Pass-through market:** There is a steady flow of summer traffic along Highway 97 amounting to a "several thousand" vehicles a day (two-way traffic). This includes tourist automobiles, RVs and motor coaches. – **Destination markets**: The study area is not known as a destination area except for a few specific commercial recreation activities, and for two internationally known resources. The main activity markets currently destined to the study area are hunters, fishers, hikers and people interested in the area's history. The two key resources are the historic town restoration at Barkerville and the Bowron Lake Provincial Park canoe route. The biggest single draw to the area is actually travellers visiting friends and relatives (which is a difficult market to influence).
• **Opportunities by geographic focus** – **Frontcountry opportunities:** These developments would cater to persons passing through the area and those staying in the main communities. These developments would be easily accessible and cater to a range of geographic markets and interests. – **Backcountry opportunities:** These developments would cater to specialized and dedicated markets in the non-roaded portions of the study area.

3.2.5 THREATS

Table 3-5 Threats
• **Availability of land for development** – **Implementation of the Cariboo-Chilcotin Land Use Plan:** The Cariboo-Chilcotin Land Use Plan was completed in 1994. At the time of writing a sub-regional land use plan was being initiated. Implementation of these recommendations should help clarify and help resolve competing land use issues. – **First Nations land issues:** Uncertainty about First Nations land claims is a major tourism development issue throughout the province. Resolving First Nations land related issues is crucial to add to the certainty of future land based developments. – **Preserving access to land for use by tourists and commercial recreation operators:** Ensuring access to parks, rivers, lakes and future First Nations lands for commercial recreation purposes is important to the future of land-based tourism.
• **Access** – **Air access:** Air access decreased with the domestic airline merger. – **Climate and weather**: The area has a short summer and long cold winter, both of which limit access and volumes of visitors.
• **Resource Use Conflicts** – **Tourism and other resource industries:** Conflicts between tourism use of the land base and forestry and mining uses. An ongoing issue, which will increasingly impact rural tourism, is the impact of timber harvesting based on pine beetle infestations. – **Commercial tourism and local recreation**: Conflicts between commercial users of the land base and independent tourists or local recreationalists.
• **Development Obstacles** – **Access to financing:** The central BC location of the study area, and the seasonal markets, impact project viability and access to commercial financing options (both debt and equity). – **Weak provincial economy:** BC's economy has performed below the national average through much of the 1990s. Broadly based economic improvements are necessary (regionally and by economic sector) to foster growth. – **Lack of relationships between local business operators and outside investors:** Expansions of existing tourism businesses and development of new facilities, based on the identified opportunities, would be facilitated by these partnerships.

3.2.6 SWOT SUMMARY

From the perspective of developing the adventure tourism/culture tourism sectors, the region has a number of significant strengths. In terms of the natural environment these strengths are based on wilderness and scenery, plus the variety of fish and wildlife resources. Significant wilderness and scenic features are preserved in provincial parks in the east and west portions of the region. The region has the province's most well known river as well as several regionally significant rivers, all with valuable canoeing/kayaking and fishing opportunities. However, the region's most significant tourism resources, both of which are nationally significant, are Barkerville and the Bowron Lake canoe circuit.

Countering these strengths are a number of weaknesses which need to be addressed in order for the industry to grow. Transportation and access are deterrents as the region is "a day's drive" from Vancouver as a market and as an international gateway. Highway 97 is also only two lanes for much of its length through the region. Air access capacity to Quesnel has declined, while costs remain high. In terms of market issues, the market is relatively small, seasonal, and heavily based pass-through traffic. The region also has a limited number of dedicated tourism facilities.

Opportunities exist for land, water and snow-based adventure tourism activities – all of which are significant. Market opportunities exist to capture a greater number of the pass-through vehicles, as well as to create more of a destination image for the area. The more urban or frontcountry opportunities are best suited for the pass-through market, and the backcountry opportunities for the destination market.

Threats, or outside factors influencing tourism, are significant deterrents to future tourism development. Key to rural or backcountry tourism is access to the land base – for facility construction, for touring, and as scenic viewscapes. This land access is being threatened by First Nations land claims and by resource use conflicts. Pine beetle infestations are as yet minor in the region but the spread and the resulting logging is a serious concern. Continuation of the fragile economy in central BC is also affecting the area's ability to attract investors and capital.

3.3 IMPACT OF THE CARIBOO-CHILCOTIN LAND USE PLAN ON TOURISM DEVELOPMENT

3.3.1 BACKGROUND

In 1994 the Cariboo-Chilcotin Land Use Plan (CCLUP) was announced. It was followed by a 90 day Implementation Plan to develop technical details. The plan establishes three resource management zones and one protected area zone. Resource targets and area-specific objectives are provided for all resource uses including tourism, recreation, and fish and wildlife resources. The CCLUP was prepared to guide resource development in the region and will form overall direction for sub-regional planning (currently underway). The Quesnel Forest District encompasses the northern portion of the regional plan area, and represents about 30% of the CCLUP area. (Readers are directed to the CCLUP report for zone maps.)

The following is a description of the zones.

Zone	Size	Objectives and Targets
General		Forestry, mining, grazing, tourism and recreation can proceed in all zones.
Private and Settlement	8%	Includes the urban areas, predominantly around Quesnel
Protected Areas	12%	Includes the parks that existed prior to the plan date, plus three new areas. Tourism activity is permitted (with operating permits).
Special Resource Development	26%	Resource development is to occur in a manner which respects sensitive natural areas. All resource users are permitted throughout the zone.
Integrated Resource Management	14%	All resource uses are considered appropriate within this zone. Objectives aim to integrate social, environmental and economic values.
Enhanced Resource Development	40%	All resource uses are considered appropriate. The focus is on job creation by increasing forest productivity, and developing recreation and tourism opportunities.

3.3.2 TOURISM TARGETS

The CCLUP sets targets for various kinds of resource uses, including tourism. The tourism industry is very dependent on the area's natural resources. The tourism targets focus on two fundamental factors:

- Maintenance of visual quality surrounding existing tourism facilities and key tourist use areas.
- Maintenance of tourism industry development opportunities in association with backcountry areas.

The Plan provides guidance for all kinds of resource use, by zone. The following table presents summary information on resource targets for tourism and for recreation. It is noted that the targets set for other resource uses such as fish and wildlife will also impact the tourism opportunities. The reader is referred to the CCLUP for these details.

Table 3-6
Tourism and Recreation Targets by Land Use Zone

Zone	Area ('000 ha)	Tourism Targets	Recreation Targets
Special Resource Development Zones			
Itcha/Ilgachuz	306	Promote tourism development of the western portion and focus tourism development on backcountry activities. Maintain visual quality in the viewshed surrounding existing operations.	Maintain 50% in a backcountry condition.
Lower Blackwater	102	Promoter tourism development and focus tourism development on backcountry activities. Maintain visual quality.	Maintain 20% in a backcountry condition. Maintain visual quality along the Blackwater River and Mackenzie/ Grease Trail. Implement measures included in the Mackenzie/ Grease Trail Management Plan
Quesnel Highlands	152	Promote tourism development of the western portion and focus tourism development on backcountry activities. Maintain visual quality in the viewshed surrounding existing operations, including Barkerville.	Maintain 30% of the zone in a backcountry condition, including areas adjacent to the Cariboo River and the Stanley-Cariboo Waggon Road. Maintain visual quality in the Barkerville corridor.
Quesnel Lake	333	Promote tourism development of the western portion and focus tourism development on backcountry activities. Maintain visual quality in the viewshed surrounding existing operations.	Maintain 25% of the zone in a backcountry condition, including areas adjacent to the Stanley-Cariboo Waggon Road. Maintain visual quality around Quesnel.
Upper Blackwater	88	Promote tourism development of the western portion and focus tourism development on backcountry activities. Maintain visual quality in the viewshed surrounding existing operations.	Maintain 40% of the zone in a backcountry condition, including areas adjacent to key lakes and corridors along the Blackwater River and Mackenzie/Grease Trail. Maintain visual quality in areas adjacent to key lakes and corridors along the Blackwater River and Mackenzie/Grease Trail.

Zone	Area ('000 ha)	Tourism Targets	Recreation Targets
Integrated Resource Management Zone			
Kluskus	48	Promote tourism development of the western portion and focus tourism development on backcountry activities. Maintain visual quality in the viewshed surrounding existing operations.	Maintain 30% of the zone in a backcountry condition, including areas adjacent to key lakes in the western end of the zone. Maintain visual quality around existing tourism operations.
Enhanced Resource Development			
Baezako	254	Maintain visual quality in the viewshed surrounding existing operations.	Maintain visual quality in the viewshed along the Baezaeko River.
Nazko	514	To support exiting tourism development. Maintain visual quality in the viewshed surrounding existing operations.	Maintain 5% of the zone in a backcountry condition, including portions of the Blackwater and Nasko Rivers. Maintain visual quality around existing tourism operations.
Quesnel	341	Maintain visual quality in the viewshed surrounding existing operations.	Maintain 5% of the zone in a backcountry condition, including portions of the Quesnel and Fraser Rivers, and areas on Dragon Mtn.. Maintain visual quality in the viewshed of Dragon Mtn..
Cottonwood	219	Maintain visual quality in the viewshed surrounding existing operations.	Maintain 5% of the zone in a backcountry condition, including portions of the Cariboo River and along trails. Maintain visual quality along the Cariboo River and Barkerville highway.
Beaver Valley	425	Maintain visual quality in the viewshed surrounding existing operations.	Maintain 5% of the zone in a backcountry condition, including portions of the Quesnel River and around key lakes. Maintain visual quality in the viewshed of the highway corridor and key lakes.
Batnuni	86	Maintain visual quality in the viewshed surrounding existing operations.	Maintain 5% of the zone in a backcountry condition, around key lakes. Maintain visual quality in the viewshed of the highway corridor and key lakes.

Although tourism is permitted in all zones, the key focus for adventure/ecotourism development will be in the **Protected Areas and Special Resource Development Zones**. These zones are the most appropriate because resource extraction activities are either not permitted or the impacts (on viewscapes particularly) are to be planned for and controlled.

It is noted that the ongoing pine beetle infestation could cause changes in harvesting plans. This could cause major impacts to potential tourism development areas and to related viewscapes.

3.3.3 LAND AND RESOURCE ISSUES IMPACTING TOURISM

The SWOT analysis and the Land Use plan information have resulted in a number of issues affecting rural tourism development. These are categorized below.

- **The Study Area has three distinct zones.**

The **Fraser River corridor** zone reflects the river, highway and railway corridor running north-south through the center of the region. It includes the City of Quesnel and contains most of the area's population and tourism facilities.

The **Eastern** zone contains Wells, Barkerville and the Bowron Park canoe circuit. The tourism themes/activities that are applicable in the zone include gold rush heritage, snow-based activities, lake and river based recreation, mountain-based activities, and arts and culture.

The **Western** Zone includes all of the area to the west of the Fraser River. It is very sparsely populated with the largest community being Nazko. Themes/activities applicable to this area are hiking, heritage, wildlife viewing, fishing, and lake and river recreation.

- **Forest development has a major impact on tourism.**

Increased areas of logging are significantly reducing the extent of natural-appearing semi-primitive and primitive terrain. This reduces the opportunities, qualities and extent of wilderness and backcountry adventure recreation and tourism, for commercial, guided and public activities. Similarly, forest development has fragmented natural-appearing landscapes into small, isolated pockets. Finally logging and road development, if not properly managed, can impact on fish and wildlife resources by negatively altering habitat.

However, forest harvesting and road development also increases backcountry access for a wide range of recreation and tourism pursuits. Increased access typically means a larger percentage of the population can now access and use these areas for recreation and tourism uses. Indeed road deactivation and closures has recently become an issue in some areas, as the public has become accustomed to greater access.

- **MoF recreation program (sites and trails) are important tourism resources.**

The forest service has an established network of rustic recreation sites (camping, day-use, lake access) and trails. Issues related to these facilities are: (i) the recent establishment of fees for use of many sites; (ii) the primitive condition and small size of many of the sites that do not meet the expectations of some user groups; (iii) the number of recreation sites are limited. Historic trails are un-managed and often closed to the public where they cross Indian Reserves and private land.

- **Native land claims are affecting tourism development.**

The lack of resolution of native land claims impedes land use allocation and long-term planning, and results in an uncertain future. This in turn can limit the establishment of tourism and recreation facilities and investments in commercial recreation-tourism development. Making progress on land claims will be beneficial to rural tourism development over the short and long term.

- **Tourism development is concentrated in two areas.**

Recreation and tourism activities are concentrated at the most highly developed destinations and facilities. This is best seen in the Wells-Barkerville-Bowron areas. Activities are concentrated at the developed campsites, at Barkerville and the Bowron Lakes chain where there is threat of overcrowding and degradation of the experience of users.

There is a lack of alternative areas in the region developed to a similar extent as the Barkerville area. Alternative, major destinations would provide varieties of experience and more dispersed use. Several development locations are suggested in the product analysis chapter and are depicted on the accompanying maps.

- **Recreation and tourism have impacts on the resource base.**

Recreation and tourism activities, if not properly managed, can affect sensitive biophysical features (alpine terrain, wetlands and wildlife populations) as well as heritage resources (archaeological sites and European-settler artifacts).

There is potential for conflicts between different recreation-tourism user groups, especially between motorized and non-motorized activities; i.e., (i) snowmobiling and ATV use versus cross-country skiing and snowshoeing; (ii) motor boating VS canoeing; hikers versus ATV users; (iii) commercial VS public use of backcountry areas. Continuing management of these issues will be required at the sub-regional planning level.

- **Fisheries management needs to be maintained.**

Restocking programs have been reduced and quality fishing opportunities (fly-fishing only, catch-and-release) are being lost. Fishing continues to be popular activity and the region is well known as a fishing destination. Fishing opportunities need to be maintained.

- **Regulations are intimidating for the potential developer.**

Regulations, red tape and lack of security of land tenure limit interest in investing in commercial recreation opportunities. Speeding up the acquistion process would assist the commercial sector.

- **Provincial Park management needs to continue to consider tourism opportunities.**

Several new parks have recently been created which expand the amount of protected land in the region. Management plans need to consider both public recreational access and use by commercial operators.

- **Transportation is crucial to tourism.**

Highway 97 is the only highway access to the region, and it is only two lanes Expansion to four lanes and continuing maintenance is required. The backcountry road networks are generally devoid of services (fuel, food, accommodation) or distances between services are great.

There is need for expanded and more integrated transportation into and within the region. Suggestions include scheduled and charter bus services between Quesnel and Barkerville-Wells, enhancement of rail service on the BC Rail, and upgrading air service and airport facilities at Quesnel.

3.4 SUMMARY OF FACTORS AFFECTING TOURISM DEVELOPMENT

The focus of this analysis is on adventure tourism and cultural tourism. As components of the tourism industry, they probably represent about 20% to 30% of total tourism spending (accommodation, food and beverage, transportation, retail and other travel services make up the remainder).

A considerable amount of tourism research and planning has been conducted in the Quesnel study area over the last decade. Significant progress has been made in expanding the tourism industry, although much remains to be done. Key reasons that tourism growth has been spotty are the area's distance from markets, the small population and related number of tourist facilities, limited number of significant attractions, and intervening opportunities closer to the population centre markets. There has also been a lack of resources to develop tourism facilities and to market the area.

In terms of tourism **strengths**, the region has high quality natural resources, several major rivers, some high profile provincial parks, two population centres, a rich history, and a central location. **Weaknesses** exist in the areas of transportation and access, small population base, seasonality, and limited number of facilities. **Opportunities** exist in land, snow and water-based adventure tourism; products catering to the pass-through market and the destination market; and both front and backcountry products. **Threats** include land availability, access, resource use conflicts, financing, and the weak provincial economy.

General land based issues affecting tourism development include forestry activity (particularly harvesting to deal with the pine beetle infestation), First Nations land claims, fish and wildlife management, and crown land development processes.

The product analysis process has included ten products of which six are land-based, two snow-based and two water-based. The objective of this process required that ten products be selected, which precluded analysis of any other products that may offer potential. Based on land use zoning, the most suitable areas of future resource based tourism are the protected areas and the special resource development zones. Future tourism development has been specifically targeted in the CCLUP to the SRDZs and backcountry areas.

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4.0 ADVENTURE TOURISM MARKET ANALYSIS

4.1 GENERAL TRENDS

4.1.1 SOCIO-DEMOGRAPHIC TRENDS

Demographic trends influence the social structure within which the tourism industry operates. The following point form bullets summarize key trends, generally and within age group cohorts.

Table 4-1
Socio-Economic Trends

Some General Trends

- Total Canadian population is expected to increase by some 2.6 million people between 1996 and 2006, to 31.6 million. In the US, the population will increase by 22 million from 1997 to 2007, to 290 million.
- The 50 - 59 year age group cohort will experience the greatest relative growth, with strong growth also in the older age groups. The proportion of the population under 45 years will grow only minimally or not at all.
- In the US, over half of the population will be 37 years or older by 2007; a similar phenomenon is occurring in Canada as the baby boomers age.
- The ethnic and racial make up of the North American population will continue to change as a result of a declining birth rate and immigration;
- In the US, most of the population growth will occur in the south and the west, and a significant portion of it will be in non-Caucasian segments, such as Hispanics.

The Pre Boomers (55 - 65 years)

- A much smaller market segment, born immediately before and during WW II;
- Now empty nesters, many with considerable wealth having made money from real estate, management positions and the stock market;
- Also a well-travelled market, upscale, sophisticated and demanding - many with the time available for longer, more intensive travel experiences.

The Seniors (65 years plus)

- A growing market segment, particularly in the 10 - 20 year time frame; younger seniors have a strong interest in travel, although traditionally it has been more oriented to visiting friends and relatives. This may change as the baby boomers move into this age group - a more vibrant, active senior's travel market is expected.
- Women travellers outnumber men in this age segment - this needs to be taken into account in planning travel products and experiences.

The Baby Bust (20 - 35 years)

- A much smaller market segment that tends to be more idealistic and concerned with the environment, social issues, etc.
- Raised in the technology and information age - they have a high rate of Internet usage which will be important for travel information;
- Sub-segments of this market, those highly educated and in the high technology sector, have or have expectations of, considerable wealth.

The Echo Generation (5 - 20 years)

- Children of the baby boomers - now moving into university years- obtaining a good education is very important to them
- Have grown up with television, computers, etc. - a high level of entertainment.
- It remains to be seen if their travel interests and expectations will be similar to those of their parents.

4.1.2 TRENDS IMPACTING TOURISM

Age, life stages, and earning power are key determinants for the purchase of travel products. Now, and in the future, the group having the most dramatic impact on the travel industry is the baby boomers - those persons born between 1946 and 1964. This nearly two decade long period of population growth produced nearly 10 million Canadians and 75 million Americans. In fact, approximately 30% of all Canadians and about 28% of Americans are baby boomers.

This group has been very dominant throughout their life stages and has transformed the market based on their numbers. They created a boom in school construction, in housing starts, in clothing sales, in automobile sales, and in tourism. Their impact on the travel industry will likely become even more dramatic over the next decade. This is because boomers - more than any other group in the recent past - have the financial means and the interest in travelling. Boomers typically travelled when they were younger, both on family holidays and as young adults, and are expected to remain avid travellers as they grow older. As of the mid 1990s, about 40% of all domestic travel in Canada was by baby boomers, and they spent about 50% of all the domestic travel money.

The first baby boomers to enter the peak income earning years (typically 45 to 54) did so in 1991 and the last will come through this period in 2018. Persons in this age group typically have increased incomes, and with children leaving home, the boomer parents will have the ability and the financial means to travel.

The older boomers are saving more money now that their families are growing up - and a portion of this money will be used to travel. Additional future family wealth will be driven by the trend towards two income families through the 1980s and 1990s - that should become two pension families in the current millennium.

An additional financial windfall is anticipated due to the inheritance likely to be passed on by the parents of today's boomers. This group survived two world wars, and the last century's major economic depression. These events caused boomer parents to be very financially cautious through the post war boom of the 1950s and 1960s. Much of this wealth (estimated to exceed $10 trillion throughout North America) will be passed on to today's boomers in the form of inheritance. Boomers will spend a portion of this money on travel.

Future travel by boomers is likely to be different than travel in the past, and boomers are likely to exhibit the following trends:

- more individualistic and perhaps not as likely to travel in groups
- more well travelled and travel savvy, and will be more demanding in obtaining service and value
- more knowledgeable, quality conscious and sophisticated consumers
- interested in a sense of achievement rather than rest and relaxation
- used to being fun seekers and thinking and acting young - this will continue as they age
- more environmentally aware and may shun mass travel destinations
- more likely to be interested in cultural or educational themes to their travels
- well educated and inclined to expand their education through learning oriented travel

These trends are expected to be very significant for the study area. The dominance of the baby boomer market for travel generally is well documented and they are expected to continue to be the dominant socio-economic cohort. This demographic age group is also the key consumer of adventure travel, particularly soft adventure, which is the focus of this analysis. Marketing programs geared solely to this group should form the basis of individual facility, community and regional marketing plans.

4.2 ADVENTURE TOURISM PROFILE

4.2.1 ADVENTURE TOURISM AND ECOTOURISM

A variety of terms are used to describe outdoor, adventure-type tourism. In addition to adventure tourism and ecotourism, other terms include outdoor tourism, nature tourism, and green tourism. Generally, all of these terms refer to outdoor recreation travel linked to recreation services and/or activities that take place in an outdoor land based setting. Such services and activities include wildlife viewing, hiking, trail riding, guide outfitting, biking, caving, mountaineering, llama trekking and climbing.

However, the two most common terms used to describe these activities are adventure tourism and ecotourism - and these are used often used interchangeably - but they refer to two distinct types of travel and travellers:

- **Adventure Travel** - an outdoor leisure activity that takes place in an unusual, exotic, remote or wilderness setting, involves some form of unconventional means of transportation and tends to be associated with high or low levels of physical activity;
  - Hard Adventure Travel – combines a unique experience in an outdoor setting with excitement and a degree of risk. It frequently demands physical exertion a well as a level of skill
  - Soft Adventure Travel – focuses on providing a unique outdoors experience or ‘adventure’. However, it involves only a minor element of risk, little physical exertion, and limited skills

Ecotourism – purposeful travel that creates an understanding of cultural and natural history, while safeguarding the integrity of the ecosystem and producing economic benefits that encourage preservation. Ecotourism implies a scientific, aesthetic, or philosophical approach with a high level of interpretation. Ecotourism can be considered a sub-set of adventure tourism.

For the purposes of this analysis the term Adventure Tourism will be used to represent both categories of outdoor tourism activity.

4.2.2 CHARACTERISTICS OF ADVENTURE TOURISM

The following table describes the market size, traveller characteristics, traveller expectations, and trends.

Table 4-2
Characteristics of Adventure Tourism

Topic	Description
Market Size	According to the 1996 Survey on the Importance of Nature to Canadians, which sampled Canadians 15 years of age and over: • 19.9 million Canadian adults, 85% of the population 15 and over, took part in one or more nature-related activities during 1996. • 43.7% or 10.3 million participated in one or more of 17 specified outdoor activities. They averaged 16 days of outdoor recreation per participant and 13 trips to natural areas for outdoor activities per participant • Outdoor recreation activity by Canadians totalled 1.5 billion days; • 191 million trips were made of which 3/4 were same day trips and 1/4 or 40.5 million were overnight trips to natural areas for outdoor activity. • Total spending of $11 billion on nature-related activities; $6 billion was trip-related. According to the 1998 Canadian Travel Survey: • 39% of Canadians on overnight domestic trips in 1998 participated in sporting/outdoor activities. According to the Travel Industry Association of America: • 98 million US adults have taken an adventure trip in past five years; this includes 31 million who participated in hard adventure including rafting, scuba, diving and mountain biking.
Characteristics	According to the 1996 Survey on the Importance of Nature to Canadians, outdoor or nature-oriented travellers are attracted to areas of significant natural beauty and uniqueness. Over 50% of the Canadians participating did so in national/provincial parks or protected areas. Some other key characteristics of outdoor/adventure travellers: • They respond to a wide array of travel motivators including adventure, excitement, outdoor recreation, physical activity, personal challenge, opportunity for educational experience, and environmental conservation. • Adventure travellers expect to experience activities of varying degrees of risk and excitement, and are looking for personal growth and achievement. • Demographically, adventure travellers can be typically characterized as; – between the ages of 35 and 50 – travelling alone, in couples or small groups – enjoy a relatively high level of disposable income

	– often employed in professional or managerial occupations – well-educated • Participation rates are generally higher for those aged 45 and younger; particularly those in the 25 - 44 age range, and for the more highly educated and higher income groups. • Generally 50% of all outdoor participants have attended college and 1/3 are college graduates • However, adventure travel is increasingly becoming "main-stream" - being sought by a much broader group of nature/outdoor-oriented people. Today, adventure travellers now often include families and seniors. • Adventure/outdoor travellers tend to take several vacation trips per year, often seeking out new and different destinations and experiences. • Generally, eco-tourists mirror the demographic characteristics of the adventure traveller although true eco-tourists represent a relatively small sub-set of the overall outdoor/adventure tourism market.
Trends	• Adventure tourism has been one of the great growth markets of the 1990s. Growth is expected to continue, but not at the same rate. As well, it is likely that there will be more interest in soft adventure activities, given the aging of the population. • Adventure travellers are increasingly seeking out experiences that incorporate a number of different activities, such as hiking, kayaking, birdwatching and cycling all in one tour rather than just one activity. • There is an increase in the number of women participating in activities such as camping, hiking, biking, rock climbing and whitewater rafting. • Participation in strenuous activities such as rock climbing, jogging, and backpacking shows notable decline after middle age; the decline is less pronounced in activities such as bicycling, cross country skiing, nature observation and walking. • Because of time constraints and limited leisure time, there is increasing demand for outdoor recreation opportunities close to home.

4.2.3 IMPLICATIONS FOR THE NORTH CARIBOO

Adventure travellers want outdoor experiences that are unique and genuine, as opposed to contrived or superficial. Enriching, fulfilling adventure experiences are being sought as travellers look for more experiential, participatory, and fun experiences which provide some level of learning. The North Cariboo offers the "real thing" in terms of adventure travel with indigenous cultural attractions and authentic rural outdoor products. Typically, facility owners, and the staff dealing with the patrons, are from the area and provide the friendly western hospitality that the area is known for.

Adventure travellers have often experienced adventure trips in other destinations and are attuned to good quality - they are willing to pay, but only if the value and quality of experience is there. This will be a particularly significant issue as the adventure sector in the region develops. Adventure travellers are well travelled and can be demanding. They expect good facilities and good service.

Adventure oriented travellers are increasingly sensitive to environmental practices and conditions. The existing Cariboo-Chilcotin Land Use Plan and its zonation recommendations should assist adventure tourism development by preserving natural appearing areas.

Adventure tourists are more respectful of local values, traditions, and cultures than in the past. Although not a focus of this analysis, this characteristic of adventure travellers will be very important if First Nations communities in the region embrace tourism as part of their economic development strategies.

4.3 TOURISM PRODUCT SELECTION PROCESS

Determining which products offer the greatest potential opportunity for development was made by the analysts. The selection was made based on input from existing resource significance information, tourism trends, input from local agency representatives, and from the project Local Advisory Group. To facilitate the selection process a system has been developed to compare and rate products based on their development potential.

The system is intended to evaluate tourism products/activities against a series of criteria. It is intended that those products/activities that were based on high quality resources, had market potential, and generated economic benefits to the community, would form the basis of the opportunity analysis. This process is designed to be rigorous and defensible, while being consistent among the range of products.

The evaluation matrix rates 27 tourism products grouped under the following headings:

- Snow-based
- Water-based
- Land-based
- Touring
- Services

Each of these products is rated against resource, market, and community criteria, using a scale of zero to four, where:

0 = N/A
1 = Poor
2 = Average
3 = Good
4 = Excellent

This process attempts to numerically rate each tourism product on a five-point scale, based on the knowledge of the topic by the analyst. Although this process relies on the judgment of the evaluator, it allows a great deal of information to be summarized very concisely. A description of the criteria used for the evaluation is described in Table 3-2.

Each product is evaluated and the numbers totalled for each row. (See Table 3-4) The higher the number, the "better" the possible tourism potential for each product. It is important to note that all twelve evaluation criteria (column headings) are unweighted meaning all topics are deemed to be similar in importance. This was done intentionally so as not to skew the evaluation towards any one product or group of products.

Table 4-3
Tourism Product Evaluation Criteria

Evaluation Criteria	Description
Resource Criteria:	
Quantity	The extent, size or amount of the resource to support the product.
Quality	The quality of the resource from an activity or tourism perspective.
Accessibility	The ease with which the product can be accessed relative to distance, safety, terrain and parking.
Seasonality	The number of months or seasons during which the product can be utilized.
Market Criteria:	
Existing Market	The importance of the product relative to the area's existing tourism market.
Trends	Consideration of local/regional/national trends in activity participation.
Market Potential	The potential of the product to attract visitors or increase length of stay based on consideration of resource quality, existing market profile and market trends.
Geographic Origin	The number of visitor markets to which the product appeals. For the purposes of this analysis, the four market categories include: B.C.; Regional (border states and provinces); North American long haul; and International.
Economic Criteria:	
Job Creation	The likely job creation potential within the region associated with expanding the market for each product.
Job Duration	The duration (in weeks/months of the year) of jobs created to support each product. (Should be similar to resource seasonality.)
Tourism Revenue	The amount of revenue generated (or the amount of money spent) by tourists to participate in the activity.
Employment Income	The contribution of the product to the generation of employment income based on direct and spin-off job creation.

Table 4-3
Tourism Product-Market Match Evaluation Matrix

Tourism Product	Resource Criteria				Market Criteria				Economic Criteria		
	Quantity	Quality	Access	Season	Existing Market	Trends	Market Potential	Geographic Origin	Job Creation	Job Duration	Tourism Revenue
Snow Based:											
Alpine Skiing	1	1	1	2	1	2	1	1	2	1	2
Heli/Cat Skiing	0	2	1	2	1	2	2	2	2	2	2
Nordic Skiing	4	3	2	2	2	3	3	2	1	2	2
Non-Alpine Winter	3	3	2	2	1	3	3	2	2	2	2
Ski Touring	3	3	2	2	1	3	2	2	1	2	1
Snowmobiling	4	3	3	2	3	3	3	2	2	2	2
Water Based:											
Freshwater Fishing	4	4	2	2	2	2	3	2	2	2	2
River Kayak/Canoeing	3	4	2	2	2	2	3	2	2	2	2
River Rafting	3	3	2	2	1	2	2	2	2	1	1
Wildlife Viewing	4	4	2	3	3	4	3	3	2	2	2
Land Based:											
Camping	3	3	2	2	2	2	2	3	2	2	2
Hiking	4	3	2	2	1	3	2	2	1	1	2
Hunting	3	3	2	1	2	1	2	3	2	2	2
Industrial	3	3	3	2	2	2	3	3	1	2	2
Rock Climbing	2	2	1	2	1	1	1	2	1	1	2
Trail Riding	4	3	2	2	2	2	2	2	2	1	1
Wildlife Viewing	4	4	2	3	3	4	3	2	2	2	2
Touring:											
Automobile	3	3	2	3	3	3	3	3	2	2	2
Bus	3	3	2	1	2	3	3	3	2	1	2
Lake/River	3	4	3	2	2	3	3	2	1	1	2
Air	3	3	2	2	1	3	3	2	1	1	2
Services/Themes:											
Attractions (Comm.)	1	1	1	1	1	3	3	3	2	2	2
Attractions (Heritage)	2	4	2	2	3	3	3	3	2	2	2
Events/Festivals	2	2	2	2	1	3	3	2	1	1	1
First Nations	2	4	2	2	1	4	4	3	3	2	2
Food and Beverage	2	2	2	3	2	2	1	2	3	2	2
Lodges	2	2	2	3	2	3	3	3	3	3	3

(Scale 0 –4 : 0 = n/a 1 = poor 2 = Average 3 = Good 4 = Excellent)

Based on the above analysis, the adventure or cultural products selected for analysis here are (in alphabetical order):

- Automobile touring
- Freshwater fishing
- Heritage attractions
- Hiking
- Industrial Tourism
- Lodges
- Non Alpine Winter Activities
- River Kayaking/Canoeing
- Snowmobiling
- Wildlife Viewing

It is noted that four products scored higher in the ratings but for various reasons were not selected for inclusion here. The rationale for these changes is as follows:

Product	**Rationale**
– Skiing	Focus is on projects that have a reasonable chance of success in the short to mid-term. Developing new ski areas is very costly and time consuming. Furthermore, more suitable terrain closer to population centres exists elsewhere in the province.
– Heli-Skiing	Very good heli-skiing terrain exists in the Cariboo Mountains in the eastern portion of the region. There is interest in expanding into this area but the base of operations (and the related jobs) would be outside the region providing no direct benefits.
– First Nations	There is an historic and current presence of First Nations people, with long and rich heritage in the area. However, First Nations were not represented on the project TOS steering committee and have not been part of the planning process. Although invited to participate, First Nations chose not to and it was considered inappropriate to plan for First Nations products without direct First Nations input and participation.
– Trail Riding	Good resources exist in the study area, but the south Cariboo is better known for trail riding/horse related products. The Williams Lake/100 Mile area is also closer to markets.

4.4 SUMMARY OF FACTORS AFFECTING TOURISM DEVELOPMENT

The adventure tourism market is huge with 85% of Canadians participating in one or more nature-related activities. Nearly 100 million of Americans have participated in an adventure tourism trip in the past five years.

The most significant market for adventure tourism is the baby boomer market. It represents about 30% of the North American market. This market is travel savvy, well educated, and relatively affluent.

They respond to a wide array of travel motivators including adventure, excitement, outdoor recreation, physical activity, personal challenge, opportunity for educational experience, and environmental conservation. Adventure travellers expect to experience activities of varying degrees of risk and excitement, and are looking for personal growth and achievement.

Adventure tourism has been one of the great growth markets of the 1990s. Growth is expected to continue, but probably not at the same rate. As well, it is likely that there will be more interest in soft adventure activities, given the aging of the population. Furthermore, adventure travellers are increasingly seeking experiences that incorporate a number of different activities, such as hiking, kayaking, bird watching and cycling all in one tour or out of one lodge.

The products having the most broadly based appeal are auto touring, heritage and cultural attractions, and wildlife viewing. Products having a more select market due to skills required or special interests are fishing, hiking, river/lake recreation, and snowmobiling. Regardless of skills required, there is a market for entry-level activities offering instruction and interpretation.

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5.0 ADVENTURE TOURISM OPPORTUNITIES IN THE NORTH CARIBOO

5.1 THE PROCESS

An important component of this analysis is the preparation of an action plan for each product. This is intended to further the product development process by providing details on specific aspects of the selected products.

These plans are based on the need to ensure that the recommendations:

- are actionable by provincial and regional regulatory agencies
- are actionable by existing and potential operators
- are realistic and attainable
- can be initiated within the immediate future
- take advantage of immediate or short-term opportunities while providing a framework and objectives for the longer term
- balance community and visitor needs and interests
- have community support.

The locations suitable for various products have been mapped as part of the analysis process. This information was generated in the field based on secondary source information and input from local industry representatives. The draft field mapping was done at a scale of 1:50,000 in the eastern portion of the region, and at 1:250,000 in the western portion. The different scales were used because of the different levels of information available in the two areas.

For presentation purposes the digitized maps have been reproduced at a scale of 1:200,000 – one each for the east and west sections. For reporting purposes, these plots have been further reduced to 11" by 17". (See Appendix D.)

Each of the products has been assessed from several perspectives. These are:

Table 5-1
Adventure Tourism Product Assessment Criteria

Criteria	Description
– Description	Definition or description of the product.
– Market Size	Estimate of the number or proportion of the population that participate in the activity, either generally or as part of a trip.
– Demographic Profile	Description of the characteristics of the participants in terms of age, gender, etc.
– Trends	Changes in market characteristics or other factors that are affecting demand.
– SWOT	Strengths, Weaknesses, Opportunities and Threats relating to each product.
– Implications for the North Cariboo	Descriptions of the likely impacts or issues that will affect the North Cariboo study area.
– Development Opportunities	Description of the activity and the kinds of opportunities that could be developed within each category area.
– Markets	Description of the geographic origins and market segments offering the best potential.
– Resources/ Locations	Description of the locations having development potential based on the quality of the resource and access.
– Economic Impact Potential	Size of the development opportunity as measured by the number of developments that may be possible and the number of jobs that could be created.
– Development Considerations	Issues that need to be addressed in order to advance the product opportunity.
– Product Linkages	Link or relationship to other activities or products.
– Community Actions	Actions to be addressed by various agencies to assist in furthering the product development.

5.2 PRODUCT SPECIFIC DESCRIPTIONS

The following are the product specific action plans for each of the ten selected products. The are presented in alphabetical order as follows:

- Automobile touring
- Freshwater fishing
- Heritage attractions
- Hiking
- Industrial Tourism
- Lodges
- Non Alpine Winter Activities
- River Kayaking/Canoeing
- Snowmobiling
- Wildlife Viewing

Product	**Auto/RV Touring**	
Description	The touring product involves sightseeing through the region by private vehicle. This may be part of a pass-through trip or a trip destined to the region. It also may use highways or back roads.	
Market Size	Sightseeing is a very significant travel motivator. In Canada, about one-third (31%) of the Canadian population participated in sightseeing in natural areas in 1996. Approximately 35% of British Columbia residents participated in sightseeing in natural areas in 1996. In 1998, 17.9 million overnight domestic person-trips (24% of a total 75 million overnight domestic person trips) included sightseeing as an activity. About 25 million domestic person-trips (18% of a total 144.3 million trips) included *sightseeing* as an activity. British Columbia had 15.5 million overnight domestic person-trips, of which 4.5 million included *sightseeing*. According to the BC Visitor Survey, over 50% of BC residents participate in sightseeing while travelling in BC. In the United States (1994-95), about 57% of the US population participated in sightseeing, representing a market of 113.4 million people.	
Demographic Profile	The market for sightseeing is fairly evenly distributed across the age brackets, however participation peaks in the 40 to 49 age range. Participation in sightseeing rises according to income level, and is almost equally split between men and women. Most are high school graduates, with 69% of college graduates participating in sightseeing, as compared with 35% of non-high school graduates.	
Trends	In 1998, Canada had 144 million domestic person-trips of which 25 million included sightseeing as an activity (18%). In 1996, there was a total of 137 million of which, 22. million (16.2%). included sightseeing British Columbia had 904,000 more person trips in 1998 than they had in 1996, an increase of 6%. In 1996, 4.0 million person trips included sightseeing, while 1998 saw an increase to of 12.5% to 4.5 million.	
SWOT	Strengths	Paved roads running both north/south and east/west. Large network of logging roads. Possibility of several circle routes. A variety of scenic landscapes from rolling ranchland to rugged mountainous terrain. Uncongested roads and highways.
	Weaknesses	Limited number of paved roads. Limited services outside of Quesnel and Wells. Few built attractions outside communities. Predominantly a one or two season activity.

	Opportunities	Developing van and bus tours. Interpreted historic tours to Barkerville. Interpreted tours to the west portion linking with First Nations opportunities. Independent tour routes intended to keep travellers in the region longer.
	Threats	Road maintenance. Deactivation of logging roads. Conflicts with other resource users. Maintenance and management of scenic vistas.
Implications for the North Cariboo	Sightseeing is the single biggest reason for travelling to the region, sited by 52% of all Cariboo visitors. (Source: BC Visitors Study.) It encompasses the notion of driving for pleasure, and tends to be a passive activity that can be participated in by virtually all travellers. The key for the North Cariboo is to get more automobile travellers to visit and to get those that do to say longer. Sightseeing is particularly relevant for the North Cariboo because Highway 97 bisects the region. Although this highway is the key access to the region, because it is a major traffic artery, it creates the "pass-through traffic" problem that has historically been a problem in the region. It creates this problem for Canadians, and for Americans travelling to Alaska. However, Highway 97 provides the opportunity for communities in the region to encourage travellers to stop and explore the region. Touring is also a key factor for the "visiting friends and relatives" market, which is a major reason for people visiting the region.	
Development Opportunities	Automobile touring includes vehicle-based sightseeing. It includes all roads that are capable of being driven safely by 2-wheel drive vehicles, including both paved and unpaved roads. Opportunities exist in two distinct areas. One is the provision of guided tours. The other is servicing visitors who stay in the region because of the touring/sightseeing opportunities. This includes accommodation, food and beverage services, entertainment and recreation.	
Markets	Road touring and sightseeing have broad market appeal and are the single most popular tourism activity in the region. Over half (52%) of the visitors to the region participated in sightseeing. Getting existing tourists to extend their stay by touring the area is a simple tactic that can incrementally increase revenue to a range of businesses. It focuses on existing visitors as opposed to generating new business. The potential markets are for families (with children) and for couples (boomers and older). The target market size is expected to be in the range of several dozen vehicles to several hundred vehicles a day depending on the tour option. (See below.)	
Resources/	There are three existing loop tours that offer good opportunities for the North	

Locations	Cariboo (and one potential loop). They are: **Barkerville – Likely**: This loop provides a round-trip from Quesnel east to Barkerville, and on to the 3100 Road from Barkerville through the Cariboo Mountains to Likely (approximately. 100 km), and connecting to Highway 97. This 300 km route is extremely scenic with spectacular views of the Cariboo Mountains along the Mathew Valley. Opportunities exist for hiking (Cameron Ridge), fishing (Cariboo River), and wildlife viewing. **Nazko Valley Loop:** Quesnel along the Blackwater Road to Nazko (approximately. 100 km), north to Gillies Crossing, back to Backwater Road. The Nazko Valley contains some of the area's oldest homesteads and provides scenic river and lake environments. Opportunities exist for fishing, hiking and winter activities along this 200 km route. **West Fraser Loop:** From Quesnel this route crosses the Fraser River and down the West Fraser Road to Marguerite and back across the Fraser River by reaction ferry, and return to Quesnel along Highway 97 (about 120 km return). The route winds through ranch country and the Fraser River bench lands. Opportunities exist for hiking and wildlife viewing. **Highway 16 via Bowron River:** (Note: This route is not developed and requires reactivation of existing logging roads.) The route connects Highway 26 to Bowron Lake joining Highway 16 near Purden. The route travels through rolling forest land along the west slopes of the Cariboo Mountains. The route transits the largest clearcut in North America and provides industrial forestry interpretation opportunities.
Economic Impact Potential	Opportunities exist to develop interpreted tours. Employment would be created for interpreters, drivers and related service persons. These opportunities exist for existing companies to expand, or for new business start-ups. A roster of circle tours could entice travellers to the region to extend their stay. This would generate revenue and create incremental employment for accommodations, food and beverage, recreation services, and entertainment. Neither opportunity creates any negative economic impacts, as there is limited conflict with other users, and would likely have high community acceptance. However, overall revenue generation and job creation are probably modest.
Development Considerations	The study area has "good" scenery but is less spectacular than many areas of the province. The vistas are probably of a regional and provincial caliber as opposed to the national or international significance of other areas. The circle tours represent a range of traveller options from a few hours to a full day or more. Possibilities also exist for other regions to develop intervening opportunities. Industrial activity and the presence of logging trucks could affect safety. Signage, route theming, and route designations would need to be developed. There also could be private land issues and First Nations land claims issues.
Product Linkages	Touring and sightseeing provide links to:

	Recreational activities such as fishing, wildlife viewing, hiking, etc. Heritage and cultural sites and attractions. Services such as accommodations, restaurants, service stations, and other tourism facilities.
Community Actions	A number of actions are required to capitalize on the road sightseeing opportunities. These are as follows: – Endorse and incorporate touring as a component of the area's tourism mix. – Create the series of loop tours identified in this report within the region and connecting to other regions to the north and south. – Prepare a driving map of the tour routes which identifies points of interest and lists activity options. – Include these routes on the area's web site (CCCTA). – Approach existing tour operators and potential entrepreneurs to determine interest in providing tours. – Develop a signage strategy and a route theming program.

Product	**Freshwater Fishing**
Description	Freshwater fishing includes angling for fresh water sports fish in rivers, streams and lakes. This angling could be done from shore or by boat, and includes spin casting, trolling and fly fishing.
Market Size	In Canada 17% of the population, or 4.2 million Canadians, participated in recreational fishing in 1996. Approximately 13%, or 3.1 million Canadians participated in recreational fishing as the main activity while travelling. Nearly one in ten (9%), or 2.2 million Canadians, participated in *recreational fishing* as a secondary activity of their trip. About 6% of overnight domestic trips in 1998 (4.8 million overnight person-trips) involved fishing, similar to the 7%, or 4.8 million person-trips in 1996. About 4% of total domestic trips in 1998 (5.8 million person-trips) involved fishing, in line with the 4.2%, or 5.7 million person-trips in 1996. In 1998, Canadians made 15.5 million person trips to or within British Columbia, of which 783,000 person trips (5%) included participation in fishing. Approximately 24% of BC residents fish while travelling in the province. In the United States (1994-95), 24% of the US population, or 49 million people, participated in freshwater fishing.
Demographic Profile	Based on the survey on the Importance of Nature to Canadians which surveyed Canadians 15 years of age and over, Canadians participating in recreational fishing in 1996 may be described as: – 66% male; – mainly 25 to 54 years of age (23% are 25 to 34 years, 27% are 35 to 44); – 78% are urban residents; – most have some post-secondary education (55%, of which 29% have a certificate or diploma and 15% have a university degree); – mainly have low to middle level personal incomes although 16% have incomes of $50,000 or more.
Trends	The market for recreational fishing is becoming segmented according to the type of fish (salmon, bass, etc.) and type of fishing (fly-fishing, spin casting etc.). British Columbia experienced 904,000 more person trips in 1998 than they had experienced in 1996, an increase of 6%. The number of person trips including fishing increased by 18% over the same time period, from, 661,000 person trips in 1996 included to 783,000 in 1998. In the United States, there has been a decrease of 3% in the number of fishing participants from 83/84 to 94/95 - a drop of 1.8 million participants. However, preliminary data for 2000 indicates that participation in fresh water fishing is trending up.

SWOT	Strengths	Good variety of fishing opportunities in terms of various types and sizes of rivers, streams and small to medium-sized lakes. Moderate variety in terms of species and size of fish available, from small, pan-sized fish in the smaller streams and lakes to large fish in some of the larger rivers. Good road access throughout the region to many of the fish-bearing waters. Good fishing in easily accessible lakes (i.e., Dragon Lake)
	Weaknesses	Limited number of very high quality fishing opportunities in wilderness-type settings. Uncertainty and changes in regulations. Declines in anadromous fish stocks (salmon and steelhead) and the resulting fishing opportunities. Difficulty in obtaining guiding licenses.
	Opportunities	The best opportunities for tourist commercial fishing appear to be related to casual fishing activities carried out in conjunction with other activities such as camping, canoeing, touring, nature appreciation, wildlife viewing, etc. Expand and popularize the acceptance of catch and release and manage the resource for the production of higher quality fishing opportunities (larger fish, natural settings) as opposed to smaller, more abundant fish). There appear to be modest opportunities for commercial sports fishing and lodge-based fishing.
	Threats	Reduced fishing stocks. Restricted catch limits, open seasons and gear restrictions. Conflicts with resource extraction industries; degraded appearance of terrain adjacent to fishing areas. Increased road access is threatening the remote fly-in locations. Limited wilderness-type settings outside of parks.
Implications for the North Cariboo	In spite of fluctuating fish stocks and increasing regulations (provincially) fishing continues to be a popular activity in the region. Nearly one-quarter of all resident travellers to the region fished. (Source: BC Visitor Study.) The Cariboo appeals to both the casual and the ardent angler. The casual fisher is someone who will fish "a few times a year" as the opportunity presents itself. The ardent angler travels in order to fish. The Cariboo is highly regarded as a sports fishing destination (mainly based on rainbow trout) for both of these categories of anglers. The ardent angler (particularly fly fishers) will continue to be attracted to high quality fishing destinations providing a reasonable expectation to catch fish. Opportunities exist to cater to this group of anglers particularly in the west portion of the region.	

Development Opportunities	Fishing includes casual to more serious sport anglers. The former is more likely to prefer easy access to high quantities of small fish, and the later more likely to seek out (and pay for) more remote, higher quality opportunities in wilderness settings. Commercial opportunities include packaged fishing tours, fishing resorts, as well as the indirect revenues associated with accommodation for independent anglers.
Markets	Markets for much of the easy access locations are relatively close-in (regional markets). More distant markets (other Canada and American) are candidates for the remote, fly-in access locations. Overseas and long-distant visitors would be willing to pay for an exclusive experience available in lakes and rivers in the western portion of the region.
Resources / Locations	The highest potential for guided and/or lodge-based fishing is into the western portion of the region. Several lakes including Marmot Lake and Fishpot Lake are excellent fly-fishing and will yield rainbows from 5 to 8 lbs. Brown (Bishop) Lake is a trophy lake yielding rainbows up to 15 lbs. The Blackwater (West Road), Baezaeko and Nazko Rivers are excellent fly-fishing for rainbow and bull trout. It should be noted that guided angling days has been limited by the Ministry of Environment in many of these locations. There may be some commercial fishing potential in the east and southeast and adjacent areas outside the forest district, such as the rivers and lakes associated with the Quesnel and Horsefly rivers and the Matthew River-Ghost Lake area. Other locations include Quesnel River and the Bowron Lake Chain.
Economic Impact Potential	Opportunities exist to expand the fishing product through guided tours and through lodge-based activity. New business opportunities exist, as do expansions of existing businesses. Self-guided fishers will support tourism services such as accommodation and restaurants, creating incremental employment.
Development Considerations	The region has a reputation as having a high quality fishery with several resources having provincial significance, upon which opportunities exist to develop additional fishing product. Lodge based fishing development will require security of tenure and convenient access. The region has a network of logging roads providing road access to numerous fishing streams and lakes. Furthermore, depending on the area of the region, First Nations land claims may be an issue.
Product Linkages	Fishing tends to be a highly focused activity and is pursued by either casual or avid anglers. However, linkages exist with such activities and sectors as: – Accommodation and food services – Campgrounds – Lodges – Hiking

	– Wildlife viewing
Community Actions	The following actions are needed to expand the opportunities within the sports fishing sector. – The region should continue to focus on fishing as part of the tourism product mix. – Encourage Ministry of Forests to prescribe Retention and Partial Retention visual quality objectives on lands within view of significant fishing areas. – Encourage Ministry of Environment, Lands & Parks to review regulations and stream and lake management guidelines to enhance higher quality fishing opportunities. – Encourage BC Parks to explore the feasibility and desirability of allowing fishing guides operate in Bowron Lakes Park. – Encourage the Fisheries Branch to increase stocking on selected lakes. – Encourage the Fisheries Branch to identify water bodies that have unused capacity for increased guiding licences. – Continue to promote and protect the high quality fishing resources in the west portion of the region.

Product	**Heritage/Cultural Attractions**	
Description	Heritage/cultural attractions include a mix of products such as historic sites, cultural sites, museums, art galleries and events/festivals.	
Market Size	Heritage/cultural products are popular with Cariboo travellers. About 22% visit a historic site(s), 13% visited art galleries or museums, and 12% visited other cultural sites. (Source: BC Visitors Study) Traveller characteristics differ depending on the travellers's heritage motivation. The general tourist participates in historic/culture viewing as one of many activities on a trip. Participation is based on the fact that the product or site is on the touring route as opposed to seeking out the site as a destination. The destination tourist has as his or her main purpose to learn and participate in historic/cultural offerings. This segment consists of approximately 25 percent of tourists. Focused tourists tend to look for more active opportunities. American research indicates that about one-third of adults take historic and/or cultural trips. About one-half of these are interested in heritage and the other half culture. In terms of the overseas market, about one-third of British visitors and over 40% of German and Japanese visitors can be considered prospects to visit a cultural site while traveling.	
Demographic Profile	Compared to the average traveller, cultural travellers tend to be: - Slightly older (late 40s) - More likely to be retired - Slightly more educated and affluent - More likely to pursue a range of activities - More likely to take group tours - More likely to stay longer - More likely to spend more money.	
Trends	Cultural tourists are looking for high-quality, authentic, memorable experiences that broaden their knowledge and provide excitement, while at the same time offering value for money. Interest in cultural tourism pursuits from BC's international markets is similar to the interest levels for outdoors, golf, and skiing. Among BC residents, visiting cultural attractions while travelling is important to about one-quarter of travellers.	
SWOT	Strengths	Great variety of high quality and significant heritage features and values. Existing heritage destinations can be enhanced by development of adjacent/related features. Good road access throughout most of region.

	Weaknesses	Minimal development of the heritage product in the west portion of the region. Distance from markets. Competition from other regions.
	Opportunities	Expand operation of Wells-Barkerville area more into shoulder seasons and winter. Develop themes associated with mining history and Chinese contribution. Create package trips including rail and bus, air and bus, and fly/drive. Establish an operating, replica paddle wheeler on the Fraser River. Promote the region for its numerous heritage trails and routes including: Cariboo Waggon Road, 1861 Gold Rush Pack Trail, Goat River Trail, Collins Overland Telegraph Trail, traditional Native heritage routes, and Alexander Mackenzie/Grease Trail.
	Threats	Forest development activities adjacent and near to heritage trails. Potential over-crowding at Barkerville and Wells. Potential conflicts with First Nations resulting in increased public access and loss of privacy.
Implications for the North Cariboo	The North Cariboo has a strong connection with the heritage/culture market. As noted, 22% of Cariboo travellers visited historic sites, 13% visited museums, and 12% visited First Nations cultural sites. The region has the province's largest and oldest heritage attraction in Barkerville. It also has what amounts to a heritage corridor along Highway 26 including Cottonwood House, Wells and Barkerville. These developments provide a critical mass for future heritage focused development.	
Development Opportunities	Cariboo gold rush history is interpreted at Barkerville, perhaps the province's single most significant heritage attraction. The length of time Barkerville has been in existence establishes heritage as a key theme for the region. The region is also well endowed with several major heritage trails. Heritage appreciation lends itself to guided, package tours as travellers are willing to pay for the convenience of being taken to major sites, learning from informed guides and having transportation, meals and accommodation arranged. *It is noted that although a rich First Nations heritage exists in the region, native attractions have not been specifically included, as First Nations did not participate in this adventure tourism project.*	
Markets	Heritage and cultural resources have broad market appeal to regional, provincial, other Canadian, American and overseas visitors. The product tends to appeal to affluent, older segment as well as families and tour groups. Heritage and cultural resources are applicable for the pass-through market as well as the destination market.	

Resources/ Locations	Several heritage developments and potential sites exist in the region which could benefit from increased development and interpretation. These are: **Barkerville** is well known as a significant provincial heritage site. Also, there are a large number of undeveloped sites that are thematically linked to Barkerville such as Stanley, Grouse Creek and Antler Creek. A complete inventory of heritage sites related to Barkerville has not been completed, but many smaller sites can be incorporated into tours. **Wells** is a company town from the 'second gold rush' in the 1930s, which now provides services for visitors to Barkerville and Bowron Lake. It has a unique heritage streetscape, with galleries and shops an active art community and an art school offering courses in all seasons. **Cottonwood House** is a 1860s roadhouse built to serve the miners travelling to the goldfields and features farm animals, gardens and household displays. **Quesnelle Forks and Keithley Creek** (just outside area) were significant towns during the gold rush. Quesnelle Forks was one of the largest Chinese settlements in the Interior. **Historic Trails** include the Cariboo Waggon Road, 1861 Gold rush Pack Trail, the Goat River Trail, Collins Overland Telegraph Trail, Native heritage routes, and Alexander Mackenzie/Grease Trail. **Nazko** area sites include the Blackwater Homestead, Krestenuk Trading Post, original schoolhouse and church, Chuntezni'i Cemetery and Homesteader Cemetery. The **Quesnel** And District Museum and Archives presents an excellent summary of the goldrush, ranching and forestry history of the Quesnel area. The Quesnel and District Antique Machinery Museum and the river front walking tour are additional heritage resources.
Economic Impact Potential	There is a high potential for expanded heritage-tourism development as a key theme for the region. Employment opportunities within the new or expanded developments for managers and small business owners to interpreters and service providers.
Development Considerations	Significant research and investment is typically required to develop the potential heritage-cultural features. This could include both public and private sector backing. Land ownership/tenure issues are likely to be encountered, as are access issues. Although not specifically researched as part of this project, partnerships with First Nations are expected to offer excellent potential.
Product Linkages	Heritage attractions link with numerous other products including hiking, wildlife viewing, nature appreciation, backroads touring, trail riding, photography, camping.

Community Actions	A series of actions are needed to expand on the heritage opportunities in the North Cariboo. These are: – Endorse heritage development as part of the tourism mix. – Encourage MSBTC to increase investments in Barkerville in terms of building stabilization, interpretation and marketing. – Encourage increased MSBTC participation in potential new developments. – Develop promotional material including brochures, maps and Internet presence. – Protect natural features and visible landscapes near and adjacent to heritage areas and routes. – Develop heritage focused tour packages that link the area's cultural attractions. – Explore the interest of First Nations people in focusing on heritage and cultural attractions as part of their tourism development economic strategy.

Product	**Hiking**	
Description	Hiking and backpacking include day and overnight walking trips usually on developed trails. Trips often include other activities such as wildlife viewing, fishing or photography. Hiking is typically of shorter duration (measured in hours) while back packing involves overnight travel.	
Market Size	In Canada about 18% of the population, or 4.3 million Canadian participated in hiking/backpacking in 1996. In British Columbia, the rate of participation is higher as 23% of residents went hiking/backpacking. Approximately 19% of overnight domestic trips in 1998 (14.4 million overnight person-trips) involved walking or hiking activities, up from 16% or 11.3 million in 1996. In 1998, Canadians made 15.5 million person trips to/in British Columbia, of which 2.7 million person trips included participation in walking or hiking in that province. In the United States, 32% of the US population participated in hiking in 1997, representing a market of 65 million people. About 7% of the US population participated in backpacking in 1997, representing a market of 14.2 million people.	
Demographic Profile	There are significant differences between the profiles of hikers and backpackers.	
	Hikers	**Backpackers**
	54% male / 46% female 60% over 35 years of age 52% married	70% male 60% under 35 years of age 61% single
Trends	Hiking/walking is one of the fastest growing outdoor activities. British Columbia had 900,000 more persons hiking in 1998 than they had in 1996. Over the same period, person trips including hiking or walking, increased by 28% from 2.1 million to 2.7 million. American research indicates the incidence of hiking has increased from 24% to 32% through the mid to late 1990s, while backpacking increased from 8% to 11%.	
SWOT	Strengths	Numerous heritage trails and routes of high historic significance. Great variety of terrain types (open plateau to west, rivers to east, alpine terrain to east and west, high scenic values along Fraser River). Good road access throughout most of region. High participation rates. High scenic values and semi-wilderness qualities in Cariboo Mountains.

	Weaknesses	Very limited infrastructure, support and facilities (toilets, signs, camping) along most existing trails. Short season and inclement weather can persist through part of summer. Limited, quality hiking trails in proximity to major centres (Quesnel) and highway accessed areas. Commercial trail opportunities are difficult to establish because of costs of development and maintenance. Trails and potential routes cross private land and Indian Reserves.
	Opportunities	Wilderness and heli-hiking opportunities in Itcha-Ilgatchuz and Cariboo Mountains. Helicopter access broadens market to older, less adventuresome users. Backcountry trail opportunities in Bowron Park. Casual hiking/trail opportunities in frontcountry areas and around Quesnel City area. Possible hut-to-hut opportunities along the longer trail routes.
	Threats	Competition from other trails in other parts of province. Visual and/or noise impacts from logging and forest development. Little public funding available for trail development.
Implications for the North Cariboo	Hiking in the Cariboo is a popular activity as 28% of visitors indicated they hiked or backpacked while in the region. (Source: BC Visitor Study). A mix of hiking opportunities exist from casual riverfront trails in Quesnel to famous historic trails offering multi-day backpacking trips. Hiking caters to the pass-through market and to the visiting friends and relatives market by providing short walks providing interesting vistas and or interpretation about the area. The areas longer hikes are significant enough to generate destination backpackers. Over the years a number of hiking/trail related studies have been conducted. Trails have been identified as important recreational and tourism resources. They are indigenous to the area and provide a link to the heritage theme discussed above.	
Development Opportunities	Hiking is comprised of a range of activities from casual and easy to challenging and difficult; the spectrum includes: day-hiking, backpacking, trekking, mountaineering, and includes heli-hiking. Hiking and backpacking involve walking on trails in the front/mid/backcountry. Hiking is the less demanding form of trail use, typically on less arduous trails, in the front/mid country, for short durations. Backpacking is a more adventurous and demanding form of hiking and involves overnight travel in the mid/back-country. Hiking opportunities exist in two categories. One is guided and interpreted hiking, both for short hikes and longer backpacking trips. The other, more indirect opportunity, is the support services of overnight accommodation and	

	related services to be purchased by hikers before and after the hike.
Markets	Hiking has a broad market appeal, being popular among all income levels and equally popular with men and women. (About one quarter on the North American population go hiking.) Pass-through markets are a key target for short duration, interpreted hiking tours. Destination oriented travellers are candidates for longer, more adventurous hikes, particularly in conjunction with other activities such as fishing, wildlife viewing and staying at a lodge.
Resources/ Locations	The resources for hiking are distributed throughout the North Cariboo. The Wells area has a well-developed trail network that includes very short (2 to 7 km walks close to the community as well as 5 – 7 hour alpine hikes to Mt. Agnes, Mt. Murray, Mt. Tinsdale or Two Sisters. The Stanley-Barkerville section of the Cariboo Waggon Road is also a popular day-hike. In addition Wells-Barkerville is situated between two important sections of the National Hiking Trail – the Goat River Trail from Highway 16 to Barkerville and the 1861 Goldrush Pack Trail from Barkerville to Keithley Creek. These trails provide multi-day hiking opportunities and would be suitable for guided experiences. The National Hiking Trail (a new non-motorized national trail) continues west of Quesnel along the Collins Overland Telegraph Trail to the Alexander Mackenzie Trail, which runs along the Blackwater (West Road) River west to Bella Coola. There are currently limited hiking opportunities within the Cariboo Mountains and Bowron Lakes Park (within the Quesnel Forest District), but opportunities exist for the "hard" adventure market. The same market applies for the Itcha-Ilgatchuz mountains. In the Nazko area there are several short nature hiking potential trips to plateau lakes which have high shoreline diversity and wildlife features. The Fraser River bluffs to the north and south of Quesnel offer very accessible hiking in close proximity to Highway 97 and to population centers. Heli-hiking potential in mountainous areas (Cariboo Mountains, Quesnel Highlands, Itcha-Ilgatcho), although potential conflicts with caribou may restrict this opportunity. The Quesnel riverfront trail is an excellent urban walking resource in the City of Quesnel.
Economic Impact Potential	Most hiking is self-guided and the economic impact is restricted to pre and post hike uses of the service sector (accommodation, restaurants, etc.). However, trails of national/international significance such as the West Coast Trail can become major attractions to rural areas. Direct impacts would be created for guiding and interpretation, but opportunities are likely modest.

	Neither opportunity creates any negative economic impact, as there is limited conflict with other users, and would likely have high community acceptance. However, overall revenue generation and job creation are probably modest.
Development Considerations	There is strong need to develop value-added features but there is low incentive for private investment in trails. To be feasible, guided hiking has to be linked to other activities and provide high quality experience in attractive settings. Hiking needs to be augmented by features along the way such as scenery, vegetation, wildlife, topography, geology, water bodies, culture, and heritage. Successful trail developments need appropriate access points, signage, guide-books, facilities for garbage, washrooms, and interpretation. Private development opportunities exist for support services such as shuttles, food services and interpretation.
Product Linkages	Numerous linkages exist including: wildlife viewing, camping, heritage appreciation, viewing, photography, nature interpretation, fishing, hunting, swimming, mushroom picking, horseback riding, mountain biking. In certain situations the trails used for hiking can be complimentary to winter trail activities such as snowshoeing, snowmobiling and cross-country skiing.
Community Actions	A series of actions are required to capitalize of the extensive trails and hiking opportunities. These include: – Endorse and incorporate hiking as a component of the area's tourism mix. – Match the area's key trails with possible sponsoring or partnering agencies. – Encourage Ministry of Forests to allocate more funds to trail construction and maintenance. – Foster partnerships between agencies, industry, local communities, volunteers and interest groups to construct and maintain trails. – Explore the interest of existing tour operators to expand hiking tours options. – Determine the interest of potential entrepreneurs in developing commercially operated tours. – Canvas existing operators to determine interest in starting a communal booking agency.

Product	**Industrial Tourism**	
Description	Industrial tourism refers to a range of activities that link the primary economic sectors with tourism. It includes such activities as mill and forestry tours, farm tours and guest ranches, and mine tours and gold panning.	
Market Size	This category is a combination of several different kinds of activities and there is little general market profile information available. However, these activities tend to be pursued as part of a trip to, or through, the area as opposed to the main purpose of the trip.	
Demographic Profile	No specific information available. However, the educational nature of the activities would indicate interest by families with children and with older couples.	
Trends	No information is available on trends in Industrial Tourism.	
SWOT	Strengths	Good mix of industrial activity in the region. Location of the largest gold strike in the province. The existence of Barkerville, and its success as a heritage destination, lends credibility to recreational gold panning as an activity. Good road access.
	Weaknesses	Little opportunity for product development in the west portion of the region. Distance from markets. Lack of interest by the primary industries to encourage tourism.
	Opportunities	Encourage the industrial sector to expand industrial tours. Expand gold panning operation for tourists near Barkerville. Include gold panning as an option for tour bus itineraries.
	Threats	Forest development activities adjacent and near to gold panning areas. Potential over-crowding at Barkerville and Wells. Potential conflicts with First Nations resulting from increased public access and loss of privacy.
Implications for the North Cariboo	The North Cariboo has a history of resource extraction, initially through gold mining and more recently through forestry. There are opportunities to link both of these sectors with tourism. Visitors to areas away from their home are often interested to learn about the economy and lifestyles in the host community or region. Quesnel has several	

	mills (pulp, paper, saw and value added) which provide interesting tours. There is also the opportunity for woodlot tours. The provision of interpreted tours should be encouraged. The mining opportunities are more related to the heritage notion of panning for gold. The ideal location to recreate the gold panning experience of the 1860s is in Barkerville or Wells.
Development Opportunities	Industrial tourism refers to a range of activities that link the primary economic sectors with tourism. It includes mill and forestry tours, farm tours and guest ranches, and mine tours and gold panning. Opportunities exist to produce tours of existing operations or to allow paying customers to work at farms and ranches. Due to the gold mining history of the region, there are good opportunities to demonstrate the techniques and interpret the history of this aspect of the province's development.
Markets	Interest is expected to be highest from the non-local markets, where these kinds of industrial activities typical of the Cariboo, are not as well known. Recreational gold panning should attract a broad market because of its uniqueness, the historical context, and the fact it is indigenous to the area.
Resources/ Locations	Resources exist in a number of areas and in a number of sectors. These include the following. Forestry resources include the mills in Quesnel and their associated woodland operations. There is potential to interpret modified harvesting techniques in the Quesnel Highlands especially as part of the Cornish Mountain Trail network at Wells. Agriculture resources include the ranches, farms and quest ranches in the area. Farm and ranches also exist in the Nazko. Barkerville/Wells is the key focus for gold panning but the activity could be pursued on local creeks or around the other heritage communities along the historic access routes.
Economic Impact Potential	The economic impact and job creation potential of industrial tours is low. However, incremental jobs may be possible for part-time tour guides. The impact on the agricultural component would be by generating operating revenue from tourist guests. Tourist focused gold panning could provide small business opportunities in a few selected locations. These opportunities could be for existing small mining companies or specifically for tourist based operations.
Development Considerations	Interest of industrial operators would need to be clarified. Operators who are interested would have to put a plan in place to offer tours and ensure that it is marketed within the range of Cariboo region products.

	There are a series of approvals and permit required including: land use, servicing and development, operating licenses and placer mine permit.
Product Linkages	The most direct link of the industrial tours component is with the service sector by providing incremental business for those persons spending extra time in the region. The gold panning product would add a unique tourist activity to the product mix available in the region.
Community Actions	Several actions are recommended to expand the potential of industrial tourism. These are to: – Incorporate industrial tourism as a component of the region's tourism mix. – Include industrial tours in region's promotional material. – Develop a concept for a commercial tourist gold panning operation in or around Wells (similar to Dawson City, Yukon). – Canvass existing small mining operators to determine interest in offering tours of their operations. – Identify and map locations of industrial activity (forestry, mining and agriculture) that would be suitable for interpretation. – Explore the interest in forming partnerships between tourism operations and selected forestry and/or mining companies.

<table>
<tr><th>Product</th><th colspan="2">Lodges</th></tr>
<tr><td>Description</td><td colspan="2">Lodges are resort-type accommodations that can vary from comfortable, high-end accommodation to very rustic. They can support or provide a range of outdoor adventure activities, including hiking, mountaineering, fishing, hunting, wildlife viewing, snow shoeing, and nordic skiing. Lodges offer private accommodation in separate rooms or cabins as opposed to huts, which generally offer shared sleeping areas.</td></tr>
<tr><td>Market Size</td><td colspan="2">According to the BC Visitor Study, 11% of BC visitors to the Cariboo stayed in cabin/lodge accommodation and 2% in resorts. The small percentage of resort stays is partly a reflection of the lack of supply.</td></tr>
<tr><td>Demographic Profile</td><td colspan="2">Demographic changes indicate a growing demand for this product, in North America and internationally, especially among baby boomers. However, because a resort holiday usually implies higher levels of spending, the product appeal is relatively narrow for the overall outdoor adventure market. The demographics for a particular lodge will depend on the type of activities offered, and the experience level required to participate in the activities supported by the lodge.
Important to the soft adventure traveller are lodges that will provide the best overall "experience". This includes a combination of the accommodation, food and activities offered that are high-end and/or unique. The activity enthusiast will select a lodge based on its location and support for a particular activity. This is particularly relevant for activities such as fishing or backcountry skiing that is highly dependent on having particular resources, features and conditions.</td></tr>
<tr><td>Trends</td><td colspan="2">Lodges that used to specialize in one product or market (fishing or hunting) are becoming multi-activity. There is also a move towards more non-consumptive activities such as wildlife viewing, hiking, photography, etc.
Theming is becoming more common in order to differentiate the product and offer a particular specialty. Lodges are also becoming more upscale, providing high quality accommodation and food, and a high level of service.</td></tr>
<tr><td>SWOT</td><td>Strengths</td><td>Historically popular as a fishing resort/guest ranch area.
A range of scenery and terrain types from open range land to rugged mountains.
Numerous lake and rivers around or along which lodge accommodations could be developed.
Good access to and within the region.</td></tr>
<tr><td></td><td>Weaknesses</td><td>No critical mass of resort properties currently exists in the region resulting in no existing market awareness.
Intervening opportunities closer to markets to the south.</td></tr>
</table>

		Small regional market. Costs and development difficulties with utilities (power, water and sewage disposal)
	Opportunities	Develop resort properties that cater to a mix of outdoor adventure activities. Properties could cater to both summer and winter activities. Opportunities exist for easily accessed developments and for more remote properties. Most suitable size is probably smallish, catering to from a few to a few dozen patrons.
	Threats	Land use conflicts. Timber harvesting in viewscapes surrounding the lodge. Decommissioning of logging access roads. Competition from resort areas to the south. Possible impacts of pine beetle related timber harvesting.
Implications for the North Cariboo	The Cariboo generally has more rural resorts/lodges than the provincial average. This includes fishing and hunting lodges, and guest ranches. Provincially, 8% of non-residents stayed in resorts and 7% stayed in lodges. BC residents are much less likely to stay in resorts (1%), while 6% stay in lodges. (Source: BC Visitors Study.) These provincial figures are significantly different than for the Cariboo. About double the number of residents stay in lodges in the Cariboo than is the case provincially (11% vs. 6%). Conversely, fewer residents stay in resorts (2% for Cariboo travelers and 1% for the provincial average). There is a direct link between lodges and adventure tourism as lodges provide the accommodation and home-base for persons participating in outdoor activities. Furthermore, lodges provide the comforts that the soft adventure market is looking for. Depending on the caliber of resort, markets exist for independent personal travel and corporate meetings travel. A variety of activities and the ability to operate in more than one season are keys to the success of adventure tourism lodges. This allows patrons the opportunity to participate in a range of activities from canoeing to snowshoeing. The exception to this multi-activity rule are fishing resorts that cater to ardent fishers.	
Development Opportunities	Lodges and resorts are roofed accommodations having an outdoor recreation focus. The Cariboo has historically been known for its abundance of fishing resorts and guest ranches. There is an opportunity to create resort/lodge developments tied in with one or more of the other adventure tourism products discussed in this analysis such as canoeing, wildlife viewing, or water recreation activities. The most appropriate scale (at least initially) would be small, perhaps in the 10 to 20 room/units size. A development of this size would provide operating efficiencies, and would provide the intimacy of a small lodge experience.	

Markets	Markets depend greatly on the kinds of activities offered and on the caliber or quality of the facility. Older lodge products are priced at the low end of the accommodation range while new products are highly specialized, often offering spa services and top quality food and beverage. There is likely a market for a range of products from the more basic and rustic, to the much more elaborate and expensive.
Resources/ Locations	Lodge location siting is very dependent on the quality of resources, with a waterfront site (lake or river) being the most appealing. In the eastern portion of the study area, there is reported to be interest in developing a lodge at Stanley (near Wells-Barkerville) in order to offer heritage based tours. There is potential to locate a lodge in the Matthew Valley near Ghost Lake. Pleasant Valley (near Wells) would offer easy access to Barkerville, the cultural attractions in Wells, as well as winter recreation opportunities. Wells itself could be the base for a lodge offering cultural and natural experiences. In the western half of the Forest District, most of the larger fishing lakes have lodge development. However, there is potential for existing lodges to expand into other aspects of adventure touring, offering both summer and winter products.
Economic Impact Potential	The economic impact of lodge developments could be very significant. Lodges would require management and marketing staff, as well as housekeeping, maintenance, and food and beverage staff. Recreation and adventure tourism offerings based out of the resort would also provide employment. The benefits could be generated by existing accommodation operators expanding into the resort sector, by local residents developing a lodge, or by new operators being attracted to the region.
Development Considerations	A range of development considerations will need to be addressed. These include: Feasibility analysis and business planning Financing Land use and resource approvals Building, servicing and development approvals Operating licenses and permits A unique resource having potential as lodge sites are the UREPs (Use for Recreation and Enjoyment of the Public). These sites have been identified over the years and exist as recreation preserves. A particular issue of concern is the potential expansion of the pine beetle infestation (and the resulting timber harvesting). Currently, this insect is not widespread in the study area but its expansion is a major concern.
Product Linkages	Lodges form the focal point or the home-base for a number of adventure activities. Depending on the location and the target audience links are

	possible with hiking, fishing, winter snow activities, river/lake recreation, snowmobiling, and wildlife viewing.
Community Actions	A series of steps are required to expand on the potential offered by lodge development. These are to: – Incorporate lodge development as a component of the region's tourism product mix. – Explore development interest from local operators and from farther afield. – Prepare an investor/developer package of information relating to lodge development at these sites. – Identify the location of UREPs in the study area and determine their feasibility for lodge sites. – Target some provincial or national resort developers and determine/test their interest in developing a Cariboo resort. – Encourage BCAL to package and tender an offer for a crown land lease for a lodge development in the region.

Product	**Non-Alpine Skiing Winter Activities**	
Description	Non-Alpine Snow-Based Activities include ski touring, cross-country skiing, dogsledding, ice climbing, ice fishing, skijoring, snowshoeing, and tubing. Some of these activities are being offered at ski resorts, while others are being provided by individual operators or guides at specific locations.	
Market Size	Due to the diversity and specialized nature of the range of winter activities, little market data exits. However, about 4% of the Canadian population and 3% of BC residents cross-country ski. About 4% of Americans living in the western region cross-country ski. Less than 1% of domestic trips involve cross-country skiing. Participation in the other forms of winter recreation is thought to be much lower. These are highly specialized activities that attract small numbers of participants, however, they can be pursued with limited skills and training.	
Demographic Profile	The majority of individuals participating in these activities are typically active individuals in there 30s to 50s. The male/female ratio is thought to be slightly skewed to males.	
Trends	User trends of the non-alpine activities vary. Many activities, such as nordic skiing are often the main purpose for the users' trips and occur mainly at resorts and destination resorts throughout BC. Other activities are a secondary reason for travel. For example, a family choosing to stay at a ski resort for five days, may choose to alpine ski/snowboard for three, snowshoe for one, and a half-day for tubing and dogsledding for another. Still other activities, such as back-country/ski touring and ice climbing activities require considerable skill and often require a guide, and the necessity for extended stays. Tour operators are reporting a strong demand for a range of unique winter activities that can be offered for a half-day for people to try. These include dog sledding and snowshoeing.	
SWOT	Strengths	Moderately good climate and relatively long season Good road access to low and mid-elevation areas Good variety of terrain types and large, relatively open areas of rolling, plateau topography
	Weaknesses	Moderately long distances to higher elevation areas Long distances to markets and high population centres Competition from other regions Limited development and support for infrastructure
	Opportunities	Expansion into backcountry areas Hut-to-hut tours Use of snowmobile or snow-cats for access Product packaging with resorts/accommodation/facilities

		Develop helicopter access to the more remote and challenging areas Develop infrastructure and access in selected areas Develop circuits and guidebooks
	Threats	Poor security of land tenure Conflicts with motorized winter activities Lack of funding to develop and maintain opportunities and facilities Forest development leads to lowered visual qualities
Implications for the North Cariboo	The latitude and elevation of the North Cariboo creates a climate with relatively long and cold winters. On the plateau areas, snowfall is typically under 100cm while in the Cariboo Mountains snowfalls can exceed 400cm. As noted in the lodge description, patrons are interested in a variety of things to do. This range of winter activities addressed here provides this variety. Markets include regional independent travellers, outdoor training programs, and group travel. The tour operator market is expected to draw from the United States, Europe, and Asia.	
Development Opportunities	The non-alpine winter product is a "roll-up" of several activities and includes: cross-country skiing, backcountry skiing, snowshoeing, ice skating, ice sailing, dog-sledding, ice fishing, skijoring [dog(s) pulling a person on skis]. With the exception of backcountry skiing, all of these activities can be pursued by novices or people with limited experience. Also, technology is making these activities more accessible and safer (easier to use equipment for novices).	
Markets	Markets range from local to international. Local markets could be attracted by get-away type packages which offer instruction in these activities. International markets also offer very good potential for packages which offer a range of snow-based activities.	
Resources/ Locations	The community of Nazko hopes to develop 'Trapper Cabin' retreats in the western part of the Forest District this could be linked to ice fishing, cross-country skiing, snowmobiling, ice climbing and snowshoeing. The lodges at Bowron Lake could expand into winter products including dog sledding on Bowron Lake. Wells is an ideal location from which to experience winter activities along with courses in the arts, evening cultural events or winter carnival. Winter star gazing is a popular activity. Dog Sled operators from outside the area have brought clients to the Gold Rush Trail Sled Dog Mail Run from Quesnel to Wells. This event is coupled with a winter carnival in Wells that features events featuring skiing, dogsledding and snowmobiling.	

Economic Impact Potential	Most of the activities in this category are relatively small and will not be capable of generating significant business on their own. Realizing economic benefits from this product will depend on the degree to which activities are packaged. Back country skiing and ski touring often require the services of guides and commercial operators. Nordic and cross-country skiing are less likely to require guide services.
Development Considerations	Commercial opportunities require value added activities and services (other products, accommodation and support facilities). Commercial opportunities will have to offer a full spectrum of activities. Helicopter access to more remote areas requires planning, investment and security of land use rights. Waste management control and other utility issues for land-based products are typically significant development factors. Other considerations include security of tenure on Crown land, parking at "jump off" points, and search and rescue services.
Product Linkages	Linkages are possible with a number of outdoor activities are nature appreciation, wildlife viewing, winter camping, wilderness experience, orienteering, ice fishing. Facilities such as huts and trails might be shared with summer hiking activities.
Community Actions	A range of actions is required to realize the potential provided by non-alpine winter activities. These include: – Incorporate this mix of winter tourism activities in the region's tourism offerings. – Encourage community representatives to become involved in the sub-regional planning process (in order to preserve potential locations). – Confirmation of the availability of suitable areas for various sub-products. – Encourage investment in infrastructure and supporting services in high capability areas. – Identify potential conflict areas (with wintering wildlife, motorized winter activities, logging activities) and develop conflict avoidance/resolution recommendations.

Product	**River/lake Recreation**		
Description	River/Lake recreation includes all kinds of non-fishing activity and includes canoeing, kayaking and rafting. It includes both flat and white water versions.		
Market Size	In Canada, about10% of the population (national and in BC) has participated in canoeing, kayaking or sailing. Approximately 5% of domestic trips involved these water-based activities. Nearly one million person-trips were made to or within BC that involved non-swimming water-based activities. In the United States, less than 1% of the population kayak, 7% have canoed, and 5% have rafted. Only a small proportion of these participants could be considered avid participants.		
Demographic Profile	Demographic information is available for Americans for the three sports.		
	Canoeing	**Kayaking**	**Rafting**
	56% male 52% over 35 years 56% single	70%male 60% over 35years 60% single	65% male 50% under 25 years 68% single
Trends	An enthusiast has been defined as a person who kayaks/canoeists/ rafts several times a year, whereas a participant is anyone else who participates at least once a year. Whitewater kayakers/canoeists are generally enthusiasts dedicated to the sport. A participant is more likely to value other activities such as culture and scenery, as part of the trip experience. This category also includes special groups such as schools and women's groups, who are looking for a "once-in-a-lifetime" experience. The participant segment could also be looking for a trip which includes river kayaking as only a part of a larger, overall experience There has been a general increase in the pursuit of these activities in keeping with the growth in outdoor adventure generally. The number of people running river rapids appears to have remained stable. Interest in whitewater play (rodeo) appears to be increasing among this group of enthusiasts.		
SWOT	Strengths	Good and easy access to a variety of streams and rivers. Opportunities in semi-primitive and remote locations combined with opportunities close to good roads and communities. Presence of a few swift flowing, white-water rivers.	
	Weaknesses	Lack of supporting infrastructure. Uncertain water levels.	

		Conflicts with fishing and powerboats. Short operating season for optimum white-water opportunities. Distance from large markets and major population centers.
	Opportunities	Paddle wheel replica on the Fraser River. Jet boat tours. River and/or lake based guided tours. Competitive events and spectator opportunities. Commercial packages combining a few to several sub-products.
	Threats	Competition from other regions. Forestry activity and impacts of viewscapes. Security of put-in / take-out sites.
Implications for the North Cariboo	The market for river and lake recreation tends to be restricted to the few percent of persons that pursue these activities. The North Cariboo has a number of resources suitable for river/lake recreation. The market will likely be clubs and groups of enthusiasts who will arrange to visit the area for either canoeing or kayaking. Canoe and kayak retail shops are also potential suppliers of group tours. There is a trend towards taking trips that combine river and lake activities with other activities such as hiking and wildlife viewing. This situation fits well with the multiple activity profile of lodge guests and offers good potential in the North Cariboo.	
Development Opportunities	River recreation includes a variety of potential activities including kayaking, canoeing, rafting, boating, jet boating, and tubing. There are various categories of river recreation based on water volumes, rapids and gradient. A six-class system of classes or grades is commonly used: I = Easy; II = Novice; III= Intermediate; IV = Advanced; V = Expert; VI = Extreme. Canoeing generally requires slower moving rivers and streams and also takes place on lakes. Rafting is usually associated with larger rivers and commercial operations. Canoeing and kayaking are most often non-commercial activities. Tubing is a casual activity, often associated with family swimming, beach activities, and leisurely river drifts.	
Markets	The current markets are mainly B.C. residents or other western Canada. The U.S. and overseas markets offer potential, particularly for the well-known opportunities (Bowron Lake chain). Canoeing and rafting generally have higher participation rates than river kayaking. River kayaking groups usually engage in club outings rather than with commercial operators.	
Resources/ Locations	Several river recreation locations exist in the region. The key rivers are the following: The **Blackwater River** provides a multi-day whitewater experience along a natural river; day trips on some sections are possible; difficulty ranges from I	

	to III+. The Nazko River provides a day trip with good fishing on flat water. The **Cariboo River** from Kimball Lake to Cariboo Lake is a long day or overnight trip on flat water which provides excellent wildlife viewing and scenery. Below Cariboo Lake to Quesnelle Forks is suitable for rafting with Grade II to IV rapids. The **Quesnel River** is suitable a variety of experiences from rafting and kayaking in the section from Likely to Quesnelle Forks and in the Big Canyon near Quesnel to float trips through natural ranch land settings. The **Fraser River** is suitable for trips by jet boat, voyageur canoe or zodiac. There is a suitable landing area in downtown Quesnel.
Economic Impact Potential	Economic opportunities and jobs are expected to be modest, likely related to independent, small-scale tour operations, and as services to lodge operations. This would include rafting and canoeing. Most kayaking groups are self-guiding; there may be some commercial opportunities for Intermediate level kayaking.
Development Considerations	Development of put-in and pull-out areas is required along with parking. It will also be necessary to ensure access to appropriate water bodies. Areas suitable for river kayaking may also offer rafting opportunities.
Product Linkages	There are strong linkages to nature interpretation, viewing, wildlife viewing, camping, fishing, wilderness experience, fish run viewing, diving, cultural and heritage appreciation.
Community Actions	A number of actions are required to realize economic development activity from river and lake recreation. These actions include: – Involve local canoe/kayak recreationalists in planning for expanded commercial operations. – Highlight the key rivers/lakes and their associated recreational opportunities in promotional material. – Prepare user maps of suitable sites. – Include routes on the area's web site (CCCTA). – Work with existing river recreation operators to determine expansion interest and potential. – Canvass training institutions to determine interest in, and the market for, additional guide training. – Explore interest in establishing a cooperative booking agency for water recreation tours.

Product	**Snowmobiling**
Description	Snowmobiling is the act of riding snow machines, either on trails on open areas. It has become an increasingly popular recreational activity in Canada and the northern states. Successful snowmobile areas require not only good snow conditions and scenery, but well-developed and maintained trails as well.
Market Size	Snowmobiling is a specialized market. In Canada less than 3% of Canadians, and 1% of BC residents, participate in snowmobiling. Approximately 1% of overnight trips involve snowmobiling. In BC this represented about 60,000 trips. In the United States participation is reported to be around 5% in the northern states. There is a strong interest among non-snowmobilers to try the sport. Given the opportunity, a large number of winter travelers could be considered potential candidates.
Demographic Profile	Snowmobiling travellers have the following characteristics: – Fairly even distribution of age groups with most over 35 (60%) – More likely to be male (70%) – Travel with friends (47%) – Relatively affluent (70% with incomes of $50,000 plus) While the median age is 41, many younger people are being introduced into the activity through family outings. While the activity has traditionally been male-dominated, there are an increasing number of women, couples, retirees and families participating associated with the general increase in the soft adventure market.
Trends	There appears to have been significant growth in snowmobiling over the last decade, however retail sales of machines peaked in the late 1990s. Enthusiasts are more likely to live near areas that have good snowmobiling terrain, own snowmobiles, and be part of a local snowmobiling club or association. They look for challenging terrain that includes "powder play areas" – large, open areas with high snowfall – as well as a well-maintained, integrated network of trails for touring to interesting and unique destinations. Participants often take on snowmobiling as a day activity as part of longer trip involving other activities such as downhill skiing. They do not have their own snowmobiles and require gear as well as basic operating and safety instruction. Participants value the scenery and wildlife viewing opportunities in addition to the thrill of operating the snowmobile. Participants will go on guided tours whereas enthusiasts are more likely to plan a trip within their own group. Although specific information on their spending is not available, anecdotal

	evidence indicates that snowmobilers tend to spend more per day than conventional travellers. This higher spending is based on machine fuel and servicing, plus their tendency to travel in groups, and to use the tourist services available in host communities.	
SWOT	Strengths	Moderately good access to areas with varied capability. Suitable snow conditions and climate with relatively long season of use. Extensive back-road areas. Large areas of suitable terrain and topography. Good community services in Quesnel and Wells.
	Weaknesses	Distances from larger markets. Numerous alternative areas in other regions. Potential impacts on wintering wildlife. Relatively low population level in the immediate market area. Land use and land tenure issues. Trespass issues on private land.
	Opportunities	Circuit tour opportunities. Expand the existing snowplay areas. Expand sales and service of machines.
	Threats	Access closures. Avalanches Conflicts with non-motorized winter activities. Wildlife conflicts.
Implications for the North Cariboo	Snowmobiling is a popular winter activity for a small but active group of winter recreationalists. Numerous trails and several dedicated snowmobile play area exist in the region. The area (particularly around Wells) also has a reputation as a "snowmobile friendly" area based on their annual snowmobile festivals and events. In addition to riders who have their own machines, there is also broad interest in riding the machines as part of a winter holiday. Offering the opportunity to go for a snowmobile tour either on trails or into open bowls, would be an attractive draw. There continues to be resource use conflict between snowmobilers and other backcountry users. These users include backcountry skiers, and could include heli-skiers in the Cariboo Mountains if the current assessment of the area proves positive. Wildlife conflicts (particularly with caribou) are an ongoing concern. Snowmobliers expect maintained trails. This is a costly for the host areas and the costs can usually not be directly recovered. The payback generally comes in the spending generated in local accommodation, restaurants, etc.	
Development Opportunities	Snowmobiling involves snowmachine use on logging roads, trails and open areas for touring. Commercial opportunities exist for guided tours and for the related sales, service and maintenance. There are also revenues from use of	

	other traveller services used by independent snowmobilers. Experienced snowmobilers are not likely to purchase tours, but they will spend on accommodation and related travel services. Less experienced or novice snowmobilers are good candidates for tour options. A possible development opportunity for snowmobiling is a dedicated snowmobile lodge. This could be developed in the eastern or western portion of the North Cariboo. It could also provide a range of non-alpine activities and also a range of summer activities.
Markets	Snowmobiling mainly has local and regional significance in the region, as there are good or better opportunities through the central interior. However, a key to catering to this market is providing services and good value for money. There are expanding markets for couples and families. There are also tie-ins with winter packages at area accommodations.
Resources / Locations	**Wells** area has well developed trail system including loops for family riding and access to two alpine areas – Groundhog Lake and Yanks Peak. The Gold Rush Trail provides linkages to Prince George, Quesnel and Likely for long distance touring. **Quesnel** area has two trail networks – the 'Chip Dump' Trails and Milburn Mountain Trails. **Nazko** is well situated to develop a network of winter trails including the Alexander Mackenzie Trail, Martin Meadow and Kluskus Trail. There is also access to the high elevation areas of the Itcha Mountains from Nazko.
Economic Impact Potential	Revenue and job creation can be created by providing guided tours and with the sales and service of machines. Tours could be provided as a component of area vacation packages.
Development Considerations	Crucial to the future of commercial snowmobile is access to terrain. However, by far the two most significant issues affecting expansion of the activity are potential wildlife conflicts and conflicts with non-motorized backcountry use.
Product Linkages	Linkages and tie-ins with other outdoor products include: Winter camping, wildlife viewing, access to cross-country and backcountry skiing
Community Actions	A series of actions are required to expand the area's snowmobile appeal. These are: – Include snowmobiling as a component of the region's tourism product mix. – Assist with identification of markets and marketing needs.

	– Identify key areas (natural setting, good access, trail development potential) for development. – Contact other communities in BC that are targeting smowmobiling (i.e., Revelstoke and McBride) to see if any partnerships or shared actions are possible. – Prepare a map of snowmobile trails and play areas (with sponsorship by the area's snowmobile businesses). – Canvass area First Nations to determine their interest in expanding snowmobile based tourism.

<table>
<tr><th>Product</th><th colspan="2">Wildlife Viewing</th></tr>
<tr><td>Description</td><td colspan="2">Wildlife viewing is the act of observing the behaviour of animals in their natural habitat. It includes all types of animals, including mammals, birds and fish. It involves travelling to areas offering wildlife concentrations (waterfowl wintering areas or fish spawning channels) where there is an opportunity to observe wildlife.</td></tr>
<tr><td>Market Size</td><td colspan="2">Wildlife viewing has a broad market appeal due to the commonly held interest in seeing wild animals in their natural environment. In Canada 18% of the population, or 4.4 million Canadians, participated in wildlife viewing in 1996. Just over 6%, or 1.5 million Canadians participated in wildlife viewing as the main activity of their trip. Their participation translates into 15 million trips, of which 82% were same day. Also, 15% or 3.7 million Canadians participated in wildlife viewing as a secondary activity of their trip. A similar proportion participates in nature photography. About 4% of overnight trips involve wildlife viewing.

In the United States, 30% of the US population are reported to participate in wildlife viewing.</td></tr>
<tr><td>Demographic Profile</td><td colspan="2">The demographic profile of wildlife viewers is as follows:

- almost equally male (49%)and female (51%)
- mainly 25 to 54 years of age
- 82% urban residents;
- two-thirds have some post-secondary education
- participants are from all income</td></tr>
<tr><td>Trends</td><td colspan="2">The popularity of wildlife viewing is growing. British Columbia had 900,000 more person trips in 1998 than they had in 1996, an increase of 6%. In 1996, 226,000 person trips included bird or wildlife viewing, while 1998 saw an increase of more than 114% to 485,000. As a sub-set of wildlife viewing, birdwatching has been showing dramatic growth, with about one-third of all North Americans participating.

Wildlife viewers can be categorized as avid or casual. For the casual wildlife viewer, seeing wildlife is typically not the main reason for choosing a travel destination. It tends to be an activity that is pursued at the destination. The avid viewer will visit a destination for the sole purpose of seeing wildlife.

In BC in recent years there has been a significant increase in expanding the market for traditional hunting and fishing lodges by offering wildlife viewing tours.</td></tr>
<tr><td>SWOT</td><td>Strengths</td><td>Region has a broad range of habitat types with opportunities to view a wide variety of wildlife.</td></tr>
</table>

		Excellent opportunities to view salmon runs. Non-consumptive, low impact on resource base. Non-consumptive use of wildlife has a high acceptance level. Good road access throughout most of the region. Some special species (e.g., pelicans).
	Weaknesses	Minimal formal wildlife viewing areas exist. Distance from markets and cost to visit area. Seasonal nature of different species availability. Difficulty in predicting and being confident of viewing success. Safety issues, especially with bears. Unknown impacts on wildlife behavior and reproduction. Some species are extensively distributed, and do not concentrate in predictable areas.
	Opportunities	Develop infrastructure such as trails, guidebooks, interpretation signs and displays, viewing areas, blinds and platforms. Develop interpretation programs and education tours. Strong linkages to other activities such as canoeing, hiking, touring, etc.
	Threats	Inappropriate forest road development in and adjacent to wildlife habitats. Land use uncertainties and forest harvesting. Conflicts with hunting. Habituation of wildlife to humans can diminish viewing experience and increase safety concerns (especially for bears). Impact of viewing and human activities upon animal behavior, feeding patterns and reproduction. Potential conflicts with First Nations' interests.
Implications for the North Cariboo	To be successful as a wildlife viewing destination, it needs to be possible or likely to see wildlife within a reasonable timeframe (approximately 30 minutes). Sites need to be accessible and be uncrowded. Ideally, the sites should be in a scenic area. Wildlife viewing tours to see popular and/or unique species including pelicans, bears, caribou and moose are opportunities for the North Cariboo. Also, the opportunity to view wildlife as part of sightseeing trips or vehicle tours through the region would provide an incentive to extend the length of time visitors spend in the region. Wildlife viewing is an important component of rural lodge developments, providing another ingredient in the range of things to see and do.	
Development Opportunities	Wildlife viewing is the act of observing the behaviour of animals in their natural habitat. There are several distinct groups: carnivores (black bear, grizzly bear, cougar, wolves, coyotes); ungulates (mule deer, elk, caribou, moose); birds (waterfowl, shorebirds, water birds, birds of prey, passerines, upland game birds); fish, especially salmon runs.	

	The product involves guiding people to viewing areas and providing interpretation. The region has good potential because of the simplicity of the activity and broad appeal of seeing animals in their natural environment.
Markets	Wildlife viewing caters to a broad market. Unguided wildlife viewing could appeal to the pass-through market and provide incentives to stay longer in the region. Significant wildlife concentrations such as salmon runs, bear feeding areas, and unique species such as pelicans, will have appeal to more distant and destination markets.
Resources/ Locations	Several sites have high wildlife viewing potential. The key locations are: Bowron Lakes canoe circuit provides excellent potential to see deer, moose, black and grizzly bears. At the bridge at the mouth of the Bowron River sockeye salmon, bald eagles and osprey can be seen. The slough at the south end of Bowron Lake can be accessed as a day trip to see a variety of birds including eagles, osprey, and bitterns. The wetlands surrounding Wells provide birding opportunities especially in spring and fall when migratory birds including swans may be seen. Mule deer, white-tailed deer, moose and caribou are often seen on Highway 26 between Quesnel and Wells. The Quesnel Highlands and Itchas-Ilgatchuz are home to caribou, bear and mountain goat. The Nazko Valley provides excellent birding. Bald Eagles and osprey nest along the Nazko and Blackwater rivers, rare white pelicans feed at Wutlus and Tzazati Lakes, and trumpeter swans can be seen at Gillies Crossing. As well this area is home to most large ungulates as well as bears, wolves, cougars and lynx. The Quesnel River and tributaries of the Fraser River provide salmon spawning viewing.
Economic Impact Potential	Much of the wildlife viewing product is self-guided and independent. The economic impact is restricted to the service sector (accommodation, restaurants, etc.) for those travellers who are enticed to stay longer. Direct impacts would be created for guided and interpreted tours. Neither opportunity creates any negative economic impacts as there is limited conflict with other users, and would likely have high community acceptance.
Development Considerations	There are opportunities to combine wildlife viewing with related activities such as geologic interpretation, heritage appreciation, nature study, hiking, canoeing, and ecotourism. Association with fisheries and wildlife enhancement, and Ducks Unlimited projects are also possibilities. The activity typically has a low to medium capital investment, usually for

	transportation (private sector) and for viewing sites or platforms (public sector). Appropriate access is a key issue, as is permitting and tenures.
Product Linkages	Wildlife viewing lends itself to links with other products such as nature study, hiking, canoeing, back roads touring, trail riding, heritage interpretation. The key linkage, however, is with lodges as wildlife viewing is typically one of the activities that can be offered.
Community Actions	The following actions are intended to advance wildlife viewing as a tourism product in the North Cariboo. – Incorporate wildlife viewing as a component of the region's tourism mix. – Based on the description and mapping supplied in this report, select the most high profile location for initial development. – Prepare a development plan for the site, including consideration of species available, seasons, access, tenure, and costs. – Identify funding sources and potential partners. – Establish facilities such as viewing platforms and blinds, interpretive signage and displays. – Develop and maintain trails and access. – Develop interpretation and educational programs.

5.3 SUMMARY OF FACTORS AFFECTING TOURISM DEVELOPMENT

5.3.1 PRODUCT COMPARISONS

The preceding analysis presents a description of opportunities and development considerations for the ten products assessed. Each product has been discussed individually and independently, based on a number of development criteria. This review has produced a consistent summary of the development potential of each product.

This analysis does not, however, indicate which products are likely to be the most significant or offer the greatest economic impact. The following chart tallies the development potential of the products. It includes the following information:

- a rating of the likely cost of undertaking the development (a measure of the relative cost or ease of pursuing the development)
- the direct revenue potential (a measure of the revenue that could be generated by the development relative to the other products)
- the indirect revenue potential (a measure of the amount of the revenue that could be generated by activity participants in the area, relative to other products)
- impact rating (a measure of the relative potential economic impact – H/M/L)
- impact ranking (a measure of the numerical order from 1 (highest impact) to 10 (lowest impact)

The chart uses a three-value scale of High/Medium/Low (H/M/L). The values have been assigned by the analyst based on the information and analysis presented in the earlier chapters of this report. The scores are judgmental, but are intended to reflect the relative relationship among the products.

Table 5-1
Economic Impact Potential by Product

Product	Development Potential				
	Development Cost	Direct Revenue	Indirect Revenue	Economic Impact Rating	Economic Impact Ranking
Automobile Touring	L	L	M	L	9
Freshwater Fishing	M	M	L	M	4
Heritage Attractions	H	L	H	M	2
Hiking	M	L	M	M	5
Industrial Tourism	L	L	H	M	8
Lodges	H	H	M	H	1
Non-Alpine Winter	M	L	L	L	7
River Kayaking/Canoeing	L	M	M	L	10
Snowmobiling	M	H	H	H	3
Wildlife Viewing	L	L	H	M	6

Based on this comparison of products, the three products likely to have the greatest economic impact on the region are lodges, heritage attractions, and snowmobiling. All three **rated** "High" in terms of their economic impact, and were **ranked** 1, 2 and 3. These three products also have high development costs relative to the other products.

At the other end of the scale are Industrial tourism, Automobile touring, and River Kayaking/Canoeing – which all scored relatively low ratings, and ranked 8, 9 and 10. Although rating down the scale in terms of economic impact, they are also the least costly to develop, and relatively easy to initiate.

It is important to note that the above is an analytical exercise intended to provide an unbiased assessment of the development potential of the products. This should not preclude individuals or groups, who have a particular interest or passion for an activity that did not score high, from pursing the activity. Economic impacts (both revenue and jobs) will only be created if entrepreneurs and investors put up capital to develop these opportunities.

5.3.2 PRODUCT-MARKET MATCH

The ten products analyzed have various degrees of appeal to different markets. The following table charts the likely appeal of the ten products to different geographic markets. The matrix uses the same scale of High/Medium/Low (H/M/L) to denote the likely appeal that the products could have within each market segment. It is noted that this charting is based on "typical" commercial products, as there is a huge range of qualities and types of projects that could be developed.

Table 5-2
Tourism Products by Geographic Market

Products	Geographic Markets				
	Regional	BC	Other Can.	PNW	Int'l
Automobile Touring	H	H	M	M	H

Freshwater Fishing	H	H	M	H	H
Heritage Attractions	M	M	L	L	H
Hiking	H	M	L	L	H
Industrial Tourism	L	M	M	M	M
Lodges	H	H	M	M	M
Non-Alpine Winter	L	H	L	L	H
River Kayaking/Canoeing	H	H	M	L	H
Snowmobiling	H	H	L	L	L
Wildlife Viewing	L	M	M	M	H
Summary	**5 Highs**	**6 Highs**	**0 highs**	**1 High**	**7 Highs**
Market Size (Percent)	**30%**	**33%**	**14%**	**10%**	**13%**

This rating system is subjective but it does summarize which products appear to appeal to which markets. The tally produces the following results:

- Half of the products have strong (High) appeal to the close-in markets (Regional and Provincial). These markets are typically driving, and are within one to "a few" hours driving time away. These two markets segments currently comprise over 60% of the traveller market to the region.
- The products generally do not have particularly high appeal to the more distant markets in Canada and in the Pacific Northwest. These origin groups make up about one-quarter of the current market.
- There is strong appeal for many of the products in the more distant international markets. This is based on the uniqueness of these product offerings, and the likely appeal to this group. It is important to note that the international/offshore market is relatively small (about 13%) but could be particularly significant for individual products.

5.3.3 PRODUCTS BY LAND USE ZONE

Another issue of importance to future tourism development is the link between the products and the land use zones where particular developments are appropriate. This analysis indicates where individual products are expected to have the best chance of success.

The land use planning process in the Cariboo resulted in the creation of fourteen units within four zone categories. The four categories represent different degrees of resource development (or landscape alteration). The rating below matches the importance of the product requirements, with the features or attributes of the land use zones. It attempts to addresses the question "How appropriate is the zone for each product or activity?". For consistency, the same three point High/Medium/Low (H/M/L) has been used.

Table 5-3
Appropriateness of the Tourism Products by Land Use Zone

Product	**Land Use Zones**			
	Protected	**Special Resource Development**	**Integrated Resource Management**	**Enhanced Resource Development**

Automobile Touring	NA	H	M	L
Freshwater Fishing	H	H	H	M
Heritage Attractions	H	H	L	L
Hiking	H	H	L	L
Industrial Tourism	NA	L	H	H
Lodges	H	H	L	L
Non-Alpine Winter	H	H	L	L
River Kayaking/Canoeing	H	H	L	L
Snowmobiling	L	M	H	H
Wildlife Viewing	H	H	M	L
Summary	6 Highs	8 Highs	3 Highs	2 Highs

The Protected Areas and the SRDZs are by far the most relevant zones to accommodate most forms of adventure tourism development based on this analysis. Some activities would be precluded from parks, but most would benefit from the total resource protection afforded by this protected area status. (However, park use permits would be required for operators within protected areas.)

The SRDZ is the most appropriate zone for tourism developments, with High ratings achieved for all but two of the products. The other two zones are less appropriate due to resource extraction activities and the resulting impacts on access and viewscapes.

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6.0 ADVENTURE TOURISM DEVELOPMENT ACTION PLANS

6.1 INTRODUCTION

6.1.1 PURPOSE AND SCOPE

The overall purpose of this Tourism Opportunity Study is to identify potential tourism developments and to provide guidance on implementation. The previous sections of this report address the "opportunity identification" objective, and this chapter is devoted to providing direction on implementation.

This document is strategic - intended to identify and evaluate options, determine the opportunities offering the highest priority, and provide guidance and recommendations to assist in furthering tourism development. By design, it is a district wide document, although references are made throughout on general and specific locations, and to individual communities.

The focus of this analysis has been entirely on the adventure and cultural components of the tourism industry. Many other tourism development considerations may be appropriate at the community level but they have not been within the scope of this report.

This report is intended to provide the following:

- Consolidation of a considerable amount of tourism analysis "between one set of covers".
- Cover the entire Quesnel Forest District.
- Provide maps of the locations of potential tourism product developments.
- Include guidance for the communities of Quesnel, Wells/Barkerville and Nazko.
- Provide guidance to administrative agencies on the locations of potential products.
- Identify development opportunities that appear to have potential.
- Provide a starting point for developers in their product selection and business planning activities.

6.1.2 AUDIENCES

The report is intended to assist three distinct audiences. These are:

- **Municipalities, Economic Development Agencies and First Nations:** The report is intended to provide an understanding of tourism trends and development opportunities to assist these bodies in using tourism to diversify their economies. It also outlines a plan of action to assist in project development.
- **Crown Land Mangers:** Staff of several government agencies can use the information to help understand the interests of tourism, to identify areas of high potential, and to identify areas of potential conflict. This is intended to help managers in making land allocation, tenuring, and permitting decisions.
- **Tourism Business Operators:** The report is intended to assist persons interested in developing tourism businesses by providing market research information, identifying potential adventure tourism opportunities, and identifying lands and resource management issues that may affect tourism development. Included here are exiting operators wishing to expand or diversify, and potential entrepreneurs looking for tourism business opportunities. This information should provide background to their business planning.

6.2 COMPONENTS OF SUCCESSFUL OPERATIONS

The growth in Adventure Tourism provides opportunities for existing tourism operators and for business start-ups. It provides opportunities for multi-million dollar lodge-type products to simple interpreted tours run by a single individual.

Regardless of the kind of tourism business and scale of operation, there are some common ingredients for success. These "success factors" provide new adventure tourism business with guidance and tools for growth. They are generic and should form part of individual business plans.

Table 6-1
Adventure Tourism Success Factors

A Good Location
– For most adventure based tourism, natural areas and sites are desirable – specifically those offering high *quality natural settings* that provide outstanding opportunities for the activity/experience. – For other activities, such as snowmobiling and fishing, the scenic appeal is secondary to the resource quality. – Care should be taken to utilize sites that offer *scenic landscapes and vistas* and a *diversity of flora, fauna, and geographical features*. – A *variety of locations* might also be necessary to provide a range of experiences and activities, depending upon the type of experience offered. – *Base location and departure points* must be readily accessible from key markets - (this is particularly important for adventure operators offering part-day adventure experiences).

- Location must also have *good access* and have *available support infrastructure* near by e.g., accommodations, restaurants, etc.

Targeting Appropriate Markets

- Understand customers' *needs and wants*.
- *Identify, select and target the "right" markets for the product* - markets that are of a suitable size that will warrant sufficient yield, that can be promoted cost-effectively, and where the product has a competitive advantage.
- Offer a *diversity of products/experiences* to cater to a variety of markets in each season.
- Offer *personalized experiences to customers* and recognize that different market segments have different expectations, interests and skill levels.

Quality Product/Experience

- Provide *high quality, enriching and participatory experiences*.
- Offer *a unique, differentiated adventure experience* that has contemporary appeals for the markets being targeted.
- Offer experiences in *small groups*, and maintain a *guide-guest* ratio appropriate to the nature and skill of the activity and character of the experience.
- Provide *quality and professionalism* in all aspects of the operation - facilities, equipment, guides, maintenance of vehicles (e.g., vans), client reception, pre- and post-trip information/debriefing, client service, etc.
- Ensure guides are *skilled, certified and personable* with technical abilities and skills in the adventure activity itself, as well as a strong ability to lead and guide people, and provide a safe, interactive, fun, and enriching experience.
- Guides must also be able to provide a *quality interpretive program* that uses a variety of techniques (e.g., informal talks, literature, guided visits to sites), and focuses on learning about local flora and fauna, natural history, culture and heritage, as well as teaching the skills required by participants to take part in the adventure activity.
- Provide *rich programming* experiences including such things as social activities, entertainment, storytelling, expert lectures, hands-on activities, etc.
- Meet and exceed all regulatory requirements for *safety and risk management*.
- Ensure *quality equipment* with backup equipment and supplies available and contingency plans in place.
- *Fresh, quality, food* that is well prepared and presented (local/regional foods and menus should be highlighted, where possible).
- Pay careful attention to *trip coordination and planning* so as to deliver an error-free experience.
- Develop *a pricing strategy* that is appropriate to the experience and markets while being economically viable.
- Create *a packaging strategy* that provides customized experiences for different markets.

Care and Respect the Environment

- *Manage business operations* to be sensitive to the environment and implement *practices that minimize negative impacts* on the natural and cultural environment (e.g., refrain from accessing sensitive sites, avoid trampling vegetation, respect wildlife, pack out waste).
- *Respect local cultural traditions and values* and include interpretation of cultural features and elements in programming where appropriate.

Provide Value-Added Options and Up-sell

- *Offer "customized" experiences* - trips designed and delivered specifically for individual parties/groups.
- *Offer optional "deluxe" trips* - add into the basic experience higher-end elements such as gourmet food, upscale accommodations, private guides - at premium prices.
- Add *value-added features to the core experience* such as:
    - Personalized instruction and interpretation programs
    - Pre/post trip accommodations
    - Exclusive access to a special area or site
    - Specialized equipment
    - Small surprise gift such as a bottle of wine, local craft product, etc.
- Offer *merchandise and gifts for sale* (e.g., clothing, books).

Management Commitment and Entrepreneurship

- The adventure business must be viewed as a *commercial operation* and not as a hobby by its owners/managers.
- Successfully managing the business requires *entrepreneurship* as well as a high level of commitment in terms of *effort and time*. *Financial resources* are also required to start up the business (e.g., equipment purchase, marketing, product development, etc.).
- *Management skills are required in a variety of areas* - in the developmental stages, owners may be guiding tours as well as managing the day-to-day operations of the business. As the business develops, managers must often manage the business full-time while hired guides and other staff deliver the adventure experiences/products.
- Managers must also *enjoy dealing with people, have excellent interpersonal skills, high standards of hospitality and customer service,* and *an ability to impart enthusiasm to clients* for an adventure experience they may personally have experienced a hundred times.
- Recognize that management and staff can often be under *significant job pressure*, particularly during the operating season. (e.g., extended, multi-day trips will require guides to respond to customer needs around the clock.)

6.3 STRATEGIC ACTION PLAN OUTLINE

6.3.1 LAND USE PLAN STRATEGIES

The Cariboo-Chilcotin Land Use Plan outlines a strategy for tourism development in the region. This information sets the direction that the Ministry of Forests intends to follow primarily in land management issues affecting corridors and backcountry tourism development. The following are the key guidelines to the tourism industry intended to allow land use decisions to include favourable consideration of tourism. (Source: Cariboo-Chilcotin Land Use Plan – Tourism Sector Strategy. P. 139)

- Maintain the current diversified tourism product in the region in terms of front, mid and backcountry products.

- Locate new facilities in Protected Areas (PA) or Special Resource Development Zones (SRDZ) if they depend on unaltered or natural appearing settings.
- Locate tourism facilities to face PAs to ensure maintenance of the dominant viewscape.
- Integrate tourism uses with recreation, fish and wildlife, and cultural heritage uses.
- Concentrate tourism uses in areas that allow for management of tourism values.
- Consider activities that do not have constraining resource needs such as urban products, cultural activities, and motorized off-road activities.
- Native and non-native culture offer significant opportunity for tourism and the resources on which this product depend should be identified and maintained.

A tourism land use policy has been developed and reported in the Appendix to the Land Use Plan. The introduction to the policy states the following: *"Tourism is a significant and growing land use component in the Cariboo-Chilcotin and contributes to the region's quality of life. It plays a key role in diversifying the resource-based economy of the region. Tourism relies on secure access to, and sustainability of, a variety of high quality natural environments, resources and experiences."*

The Land Use Goal states the following: *"To encourage land use and resource management decisions that protect and manage the natural environment, high value tourism resources and cultural values on which tourism depends"*.

The policies derived from this goal state the following:

- Policy 1: The MoF will work with the tourism industry to ensure tourism land use and resource values are reflected in land use and resource management decisions on Crown land.
- Policy 2: The MoF will support the protection of areas representative of the natural, cultural and recreational diversity of the Province. The Ministry will support the management of these areas for sustainable tourism use.
- Policy 3: The MoF will consider land use plans and policies for the region when developing regional strategies and programs.

6.3.2 COMMUNITY LOCATION ANALYSIS

Tourism developments are typically delivered at the local level. Although research and planning provide information and direction at a regional and provincial level, actual product development occurs locally, on specific sites.

Within the Quesnel region there are very distinct resources and product opportunities. The following matrix describes the appropriateness or the fit between the ten products and the three communities or areas in the region. The same measures of High/Medium/Low (H/M/L) described earlier have been used.

Table 6-2
Appropriateness of Tourism Products by Community

Products	Quesnel/Fraser River Corridor	Wells/Barkerville/ Bowron Lakes	Nasko/West Region
Automobile Touring	H	H	M
Freshwater Fishing	M	M	H
Heritage Attractions	M	H	H
Hiking	M	H	H
Industrial Tourism	H	H	L
Lodges	L	H	H
Non-Alpine Winter	L	H	H
River Kayaking/Canoeing	M	H	H
Snowmobiling	L	H	H
Wildlife Viewing	M	H	H
Summary	**2 Highs/5 Mediums**	**9 Highs/1 Medium**	**9 Highs/1 Medium**

The urban area of Quesnel has a relatively lower link to the products being analyzed, as by design, the products are rural or crown land based. The east and west portions of the region - although very different in their resource base, population and current level of development - have very similar tourism development potential. Both have a "High" suitability rating in terms of nearly all the products being assessed.

6.4 TOURISM ACTION PLANS

To guide implementation of tourism at the local level, the following direction is provided to assist the region and the communities in fostering tourism development. This TOS is intended to provide guidance for tourism development at the regional level. At the local level, Quesnel has a reasonably current economic development strategy (September 1999), as does Wells (January 2000), and both of these communities strongly endorse tourism development.

Implementation recommendations are discussed under headings of administrative and management, and community based issues.

6.4.1 ADMINISTRATION AND MANAGEMENT

Endorse the contents of this study.

This report presents an analysis of opportunities within the adventure/cultural components of tourism. By design, it focuses on rural opportunities only, nor does it consider the many First Nations opportunities. Information is presented to assist local agencies in priorizing their assistance, in guiding regulatory agencies with their decisions, and in providing background information to developers, investors and entrepreneurs. The report is available in paper and electronic form.

Recommendation: The Local Advisory Committee (LAC) should endorse the study as meeting its objectives of providing information and direction to guide the expansion of adventure tourism.

The tourism industry needs a "champion" to assist with study implementation.

Tourism is a difficult economic sector to manage because it cuts across, or overlaps with, a number of other sectors. Expansion is largely dependent on the private sector, with permitting and regulations undertaken by various government agencies. (It is noted that there has been a significant public sector investment in the region, including the creation of new parks, Barkerville and investment in the Wells Gateway programs.) The Local Advisory Committee for this project strongly voiced the opinion that a central coordinating agency was necessary to manage implementation of this Tourism Opportunity Study, and to act as a champion for expansion of the Adventure tourism sector.

Recommendation: The LAC should review the options for assisting with implementation of the opportunities described in the report.

Recommendation: The LAC should encourage the Quesnel Community Economic Development Corporation (QCEDC) to oversee implementation of this study.

Recommendation: To assist implementation, Wells and Nasko should consider striking committees to work with the QCEDC.

Recommendation: A TOS report was completed for the Williams Lake forest district area at the same time as this report. The Williams Lake TOS suggests the creation of a Ecotourism Task Force to facilitate development of the sector. The LAC should consider the merits of working with organizations based in Williams Lake to create a region-wide task force.

Focus tourism development in the most suitable zones.

Most of the tourism products discussed here are dependent on (or would benefit from) unaltered landscapes. Within the Cariboo-Chilcotin Land Use Plan area, the two zones that are intended to preserve the visual resource base are the Protected Areas and the Special Resource Development Zone.

Recommendation: All adventure tourism developments that are dependent on the natural environment, are encouraged to be developed in either of these zones.

Recommendation: BC Parks is encouraged to consider allowing increased commercial use in new and existing protected areas.

Recommendation: Encourage the agencies involved with sub-regional land use planning to further endorse the importance of viewscape maintenance, particularly in the SRDZ but also in the other more intensively developed zones.

Focus on implementing the actions described in the individual product write-ups.

Each of the ten products described in Chapter 5 includes a list of actions intended to foster implementation. These include administrative issues, marketing and development.

Recommendation: Assign agency or association responsibilities to these actions and develop an implementation schedule for each product.

Encourage clustering as a tourism development concept.

Currently Quesnel, because of its urban nature, provides a "cluster" of accommodation, restaurant, entertainment and retail amenities. With the exception of Wells on a much smaller scale, no other clustering of facilities or amenities exists in the region. Tourists benefits when a number of things to see and do are grouped together in close proximity. This "shopping centre" approach benefits the businesses by focusing greater attention on the cluster than on individual businesses.

Recommendation: Encourage entrepreneurs to develop businesses in proximity to one another.

Recommendation: Encourage the agencies involved with sub-regional planning to allocate areas within the SRDZ with high tourism potential as tourism "precincts" or "tourism development nodes".

Recommendation: Encourage the agencies involved in sub-regional planning, and the QCEDC, to assess the possibilities of designating selected UREPs as tourism development sites.

Recommendation: BCAL to consider packaging a particular site for investor proposals to develop some type of tourism product.

Expand the marketing exposure of the North Cariboo.

The Cariboo-Chilcotin-Coast Tourism Association, the communities of Quesnel and Wells, and Barkerville are the key agencies marketing and promoting the region. Increased marketing would likely lead to an increased volume of business and an improved environment in which to encourage new development.

Recommendation: Continue to encourage these agencies and their funding sources to expand the tourism profile of the North Cariboo.

Recommendation: Ensure that the area's Internet presence is enticing, thorough, functional, and user-friendly.

Recommendation: Conduct a workshop for tourism operators with the travel trade to improve opportunities for packaged travel.

Recommendation: Create a tourist-focused map of the North Cariboo region depicting the driving tours, trails, canoe/kayak routes, and features of interest.

A central reservation system would expand sales and retain tourists.

Tourists (like all consumers) appreciate purchase convenience. If Quesnel (as the key center and gateway to the east and west portions of the region) could offer point-of-sale convenience, greater tourism retention should be possible. The ideal system would allow a tourist to book accommodation, tours and adventure tourism products in one place. This could be done in person in a kiosk type environment at the Visitor Information Centre and over the Internet.

Recommendation: QCEDC and CCCTA to explore the possibility of developing the capability to deliver this kind of sales approach.

Take the opportunities in this report to the marketplace.

Tourism development will be undertaken by existing operators and/or potential entrepreneurs in the area, or by operators active elsewhere and/or outside investors. They need to know about the opportunities and be encouraged to get involved.

Recommendation: Make the results of this analysis available to local educational institutions, training and funding organizations in order to encourage local entrepreneurs to explore the possibilities discussed in the report.

Recommendation: Make the information available on area web sites to indicate the opportunities to outside operators and/or investors.

6.4.2 COMMUNITY-BASED ACTION PLANS

Although this TOS is regional in scope, tourism development occurs at the local level. Tourism projects are often initiated by local agencies such as chambers of commerce or economic development commissions, and they are always site or location-specific. Also capital investments are locally based and revenues are generated (and jobs created) at the local level. Consequently, guidance is provided here to assist the three communities in expanding their involvement in tourism.

In this process, there is a key role for local/regional government. First, they need to continue their official endorsement of tourism as a component of their economy and their economic development strategy. Second, they need to assist in fostering tourism development by creating a positive environment and investment climate.

The value being added by this report is that a regional and market-based perspective is being brought to assessments at the community level. The analysis involves an integration of regionally based information with tourism development which will be delivered locally. Information is presented here for each of the communities on the topics of background, tourism themes, products and markets.

- **Quesnel/Fraser River Corridor**

Background: Quesnel is the tourism service centre for the region, having most of the area's accommodation, food services, and retail outlets. However, the city does not have a strong tourism orientation, although this is changing. The city has done a good job with its heritage displays and with the riverfront trail. It has also recently charged a single agency (the Quesnel Community Economic Development Corporation) with responsibility to coordinate the tourism development, marketing and information service functions.

Quesnel has an Economic Development Strategy produced in 1999. The tourism vision states that the community will increase its role as a gateway to outdoor adventure tourism. There is expected to be increased linkages with Wells and with the Nazko/Blackwater area. The plan states that efforts should be devoted to improving the city's tourism infrastructure and attractions.

Themes: Quesnel evolved as a forestry community and forestry remains the key economic sector. Tourism should attempt to augment this sector in order to diversify the economic base. An industrial theme and staging ground to adventure tourism are appropriate focuses.

Products: Industrial tourism is the key product. Other products offering potential are automobile touring and fishing.

Markets: The markets are predominantly automobile pass-through travellers, including BC residents and Alaska bound Americans. The destination market is heavily oriented to people visiting friends and relatives.

- **Wells/Barkerville/Bowron Lake**

Background: Wells prepared a strategy for outdoor recreation and culture-based tourism in January 2000. The strategy is intended to get more Barkerville destined pass-through visitors to stop in Wells, and to build the shoulder and winter season destination market. The current Gateway project has provided the resources to work on infrastructure development, skills development and marketing.

The District has identified a number of projects intended to meet their tourism visitation goals. These include assisting BC Parks with planning for the new Cariboo Mountain and Cariboo River Parks, developing Learning Holidays, skills development, trail development and marketing.

Tourism Themes: Wells would benefit from continuing to focus its tourism development on the 1930s mining theme. It is an indigenous theme, visually relying on the many commercial and residential building that still exist. It also is a natural tie-in with the earlier era gold mining theme of Barkerville. In addition to the architectural appearance of Wells, the other focuses of culture/heritage and adventure tourism are strongly supported by the analysis in this TOS report.

A particularly unique asset of Wells is a gaming licence held by the Jack 'o Clubs Gaming Hall Limited. This is one of only eight licences granted by the provincial government and the granting of additional licences is unlikely. Effectively developed in keeping with the aspirations of the community, and in scale with the community, gaming could be a key draw to the area. It could also be influential in getting Barkerville-bound travellers to stop and to stay longer. This development could allow Wells to offer a tourism experience similar to Dawson City, Yukon.

Products: In addition to the above, the key summer products are automobile touring, heritage attractions, hiking, lodges, river recreation, and wildlife viewing. In the winter, snowmobiling and other non-alpine skiing have good resources and an established reputation.

Markets: The markets are predominantly regional and provincial for all the above products. However, properly packaged and serviced, there is potential in attracting international visitors (from Europe and Asia) particularly for the non-alpine skiing winter experiences and for the lodge experience.

- **Nazko/ West Region**

Background: Nazko is a relatively isolated community within the region and has only a minimal tourism industry. The traditional tourism components have been guide-outfitting and remote fishing lodges. The community is small but is reportedly interested in pursuing tourism to create jobs and income for residents.

Themes: Perhaps the strongest theme or focus that is relevant for the community is First Nations culture. (However, it is noted that First Nations culture was intentionally not addressed in this TOS analysis.)

Products: In addition to the above, other products offering potential for the community are fishing, hiking, lodges, river recreation and wildlife viewing. Snowmobiling is the key winter activity.

Markets: The markets are predominantly regional and provincial for all the above products. However, properly packaged and serviced, there is potential in attracting international visitors (from Europe). Key attractions will be non-alpine winter activities and the range of lodge-based activities.

6.5 SUMMARY

The North Cariboo area has significant potential to develop its adventure tourism sector. As noted throughout this report, the area already has several historical, cultural and resource features which attract tourists, and provide a significant base upon which to expand adventure and cultural tourism in the area. At the same time, the area also has some natural resources and features which could support new adventure tourism businesses.

All tourism businesses are typically developed at the local level. Although research and planning can provide information and direction at a provincial and regional level, actual product development occurs locally, on specific sites. This TOS report is intended to provide guidance for adventure tourism development throughout the study area. For tourism development to be successful, however, local communities must see tourism as one of their key economic development objectives; and must be welcoming to tourists. Within the North Cariboo both Quesnel (September 1999) and Wells (January 2000) have reasonably current economic development strategies and both of these communities strongly endorse further tourism development and expansion.

This report suggests that the key tourism development roles for Quesnel are as a focus for industrially based tourism and as a staging ground for adventure tourism, both in the west and the east. The adventure tourism products seen as having the most potential in and around Quesnel are automobile touring and fishing. Wells has the opportunity to continue to focus and develop its unique mining and heritage themes. New potential adventure tourism product options include lodge development, river recreation, wildlife viewing, snowmobiling and other non-alpine winter activities. The Nazko area offers a remote community experience in relatively close proximity to larger population centers and travel routes. The First Nations focus is perhaps the strongest theme, with a range of possible adventure tourism products including fishing, hiking, lodges, river recreation wildlife viewing and snowmobiling.

A series of administrative/management actions have been recommended in this report to advance tourism development in the region. The key administrative issues are to endorse this TOS and to charge an agency with the responsibility to implement the recommendations presented here. The issue of championing the implementation needs to be discussed with the other two areas within the region (the Williams Lake area and the Chilcotin) as there could be opportunities in pursuing the opportunities jointly. Key marketing recommendations are to expand the North Cariboo tourism marketing and to develop a central reservation system.

Within the study area, adventure tourism's resource requirements have been recognized and offered some level of protection through the Cariboo-Chilcotin Land Use Plan. However, tourism interests, particularly backcountry tourism, need to continue to be represented at the planning tables during the current round of sub-regional planning in the Cariboo Forest Region.

There seems little doubt that adventure tourism sector will continue to expand in North America. Those communities that understand adventure tourism market trends; and can actively identify local resources and develop business opportunities; will be able to benefit from growth in the sector. While significant opportunities exist, as noted in this document it is important that land-based planning and resource development processes recognize the importance of the land and resource requirements of the adventure travel sector. As well, it is important that growth in the adventure tourism sector be properly managed to avoid negative environmental impacts and conflicts with local recreational users. Developing and managing an active adventure tourism sector will take significant local effort, but the rewards to successful communities can be significant in terms of employment and economic development.

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APPENDIX A: INFORMATION SOURCES

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APPENDIX B: FINANCING SOURCES

Funding public sector initiatives and financing private sector projects will be key to implementing the identified tourism developments. The following are brief descriptions of the tourism financial sources that are currently available. (Source: Developing a Tourism Business: A Handbook for Tourism Entrepreneurs)

Tourism Industry Loan Fund

The Tourism Industry Loan Fund is a partnership between Western Economic Diversification Canada and the Business Development Bank of Canada to provide debt financing to Western Canadian small businesses in the tourism industry. The program provides flexible term debt financing for small tourism businesses to obtain leading edge technological tools, undertake staff training, create innovative marketing strategies, undertake modest capital projects, and other priority activities to compete more effectively with growing international competition.

Community Futures Development Corporations (CFDC)

Community Futures Development Corporations provide business loans to assist existing businesses expand, or to help entrepreneurs create new businesses. Loan amounts are up to $125,000.

Canada Small Business Financing Program (BSDF)

The Canada Small Business Financing Program was created to help small businesses reach their potential by making it easier for them to get term business improvement loans to finance the purchase or improvement of fixed assets, for new or expanded operations. Administered under the Canada Small Business Financing Act (BSDFA), the program is a joint initiative between the Government of Canada and private-sector lenders.

Business Development Bank of Canada (BDC)

The Business Development Bank of Canada (BDC) is Canada's small business bank. BDC plays a leadership role in delivering timely and relevant financial and management services, with a particular focus on the emerging and exporting sectors of the economy. BDC is dedicated to helping create and develop Canadian small and medium-sized businesses.

Strategis Web Site – Sources of Financing

Industry Canada's Strategis web site - Sources of Financing, offers an extensive database of financial providers and diversified resources to build your financing knowledge. The Strategis web page is located at: http://strategis.ic.gc.ca/sources

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APPENDIX C: LICENCES AND PERMITS

The following list outlines some of the licenses and other operating requirements that must be obtained or met prior to operating most types of tourism businesses. A license is generally the final level of approval and is based on all other components such as land development and building approvals being complete.

Category	TYPE OF APPROVAL	CONTACT AGENCY
Land Use and Resource Approvals	– Rezoning Application	♦ Municipality, Regional District or Islands Trust
	– Municipal Plan or Plan Amendment	♦ Municipality, Regional District or Islands Trust
	– Crown Land Lease	♦ BC Assets and Lands Corporation
	– Foreshore Lease	♦ BC Assets and Lands Corporation
	– Water Use Rights	♦ Water Branch — Ministry of Environment, Lands and Parks
	– Development in Provincial or Federal Park	♦ BC Ministry of Environment, Lands and Parks and/or Heritage Canada — Parks Canada Agency
	– Agricultural Land Use (ALR) Application	♦ Regional District or BC Agricultural Land Commission
Building, Servicing and Developing Approvals	– Building Permit	♦ Municipality, Regional District or Islands Trust
	– Servicing Agreement (Urban)	♦ Municipality
	– Water Supply Approval (Rural)	♦ Water Rights Branch — Ministry of Environment, Lands and Parks
	– Sewage Disposal (Rural)	♦ Ministry of Health, Unit Officer
	– Solid Waste Disposal	♦ Pollution Prevention & Remediation Branch — Ministry of Environment, Lands and Parks
	– Provincial Highway Access	♦ Ministry of Transportation and Highways
	– Hydro &/or Gas Supply	♦ BC Hydro and/or private gas supplier
	– Private Utility system License	
	– Subdivision Application	♦ Municipality or Ministry of Highways (Rural)
	– Provincial Electrical Inspection	♦ Municipality or Municipal Affairs
	– Provincial Plumbing Inspection	♦ Municipality or Municipal Affairs
Operating Permits		

and Approvals	Municipal Business License	Municipality
	Liquor License	Attorney General & Ministry Responsible for Human Rights
	Food Operation License	Municipality or Provincial Health Office
	Accommodation Registration	Ministry of Small Business, Tourism & Culture — Accommodation Services Branch
	Guide & Outfitters License	Ministry of Environment, Lands & Parks
	Passenger ship or Charter Boat License	Canada Coast Guard
	Passenger Aircraft License	Transport Canada
	Fuel Storage	Ministry of Environment, Lands and Parks — Pollution Control Branch
	Taxi, Bus or Other Passenger Vehicle	Motor Carrier Commission
	Travel Agency or Tour Operator	Attorney General & Ministry Responsible for Human Rights

Source: Developing a Tourism Business: A Handbook of Tourism Entrepreneurs, 2001

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APPENNDIX D: TOURISM PRODUCT MAPS

A series of four maps have been prepared for this study. These maps locate the tourism product opportunities discussed in the report. Due to the shape of the study area, and to increase clarity of the maps, the region has been separated into east and west sections.

Base map features are included on all maps including roads, railways, rivers and lakes. Land use features are also depicted including existing and new provincial parks, Special Resource Development Zones (SRDZs), and Indian Reservations.

The following tourism product information has been provided by season.

Summer	Winter
Water Recreation	Lodge
Fishing	Ski Trail
Hiking Trail	Ski Play Area
Heritage Site	Snowmobile Trail
Auto Touring	Snowmobile Play Area
Lodge	
Industrial Tourism	
Wildlife Viewing	

MAPS

The following maps were modified from their original size in order to reduce downloading time. As a result, some features may appear unclear. Please refer to the maps in the hard copy report if you require more detail. The maps are in PDF format and are viewable using Adobe Acrobat Reader.

Summer Features – Western Section	(2.2 MB)
Summer Features – Eastern Section	(2.7 MB)
Winter Features – Western Section	(2.1 MB)
Winter Features – Eastern Section	(2.5 MB)

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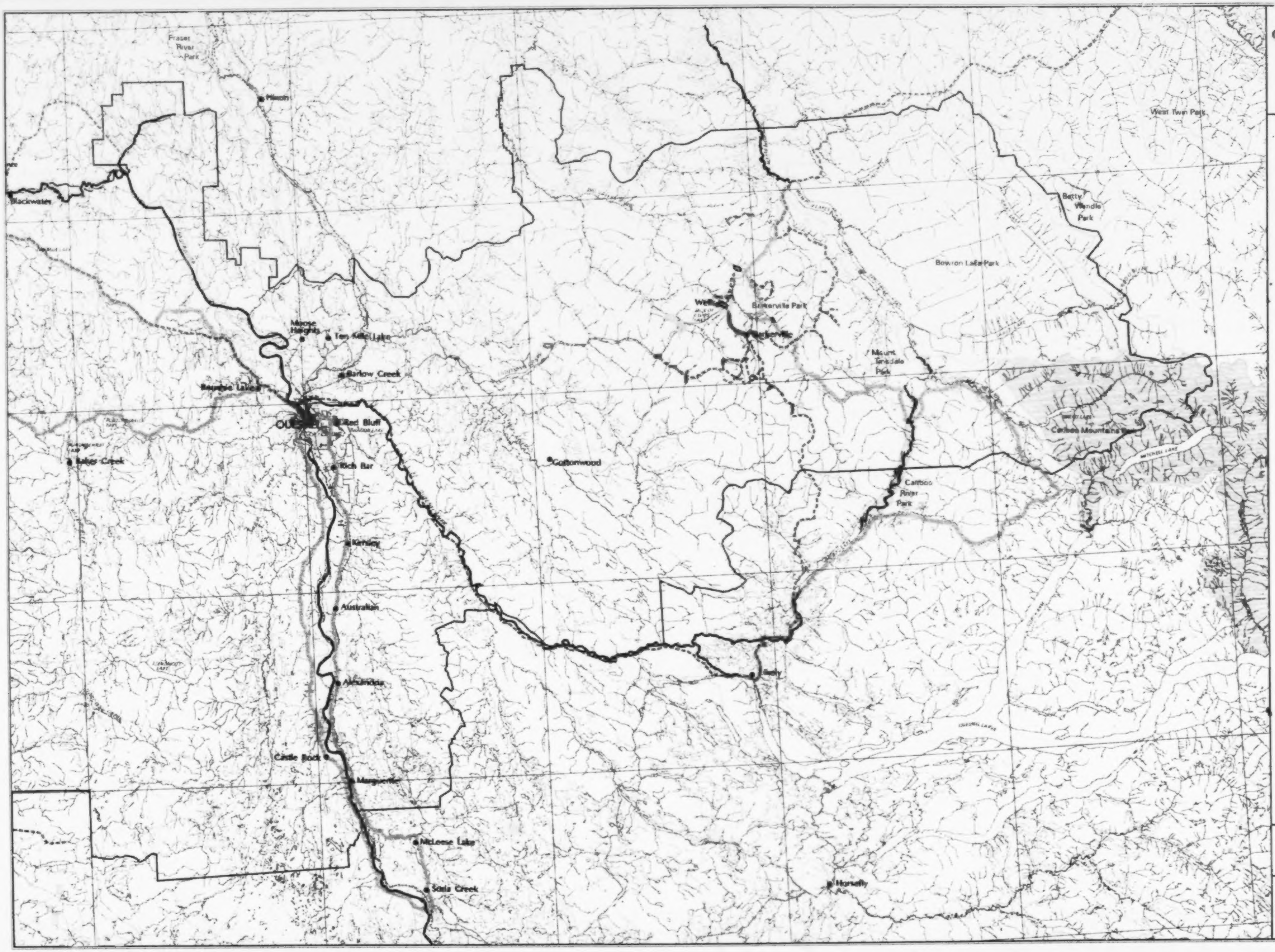
QUESNEL FOREST DISTRICT TOURISM OPPORTUNITY STUDY

Eastern Portion

Summer Features


Fraser River Park
Nazko
Blackwater
Moose Heights
Ten Mile Lake
Barlow Creek
Bouchie Lake
Quesnel
Red Bluff
Baker Creek
Rich Bar
Cottonwood
Kersley
Australian
Alexandria
Castle Rock
Marguerite
McLeese Lake
Soda Creek
Wells
Barkerville Park
Barkerville
Mount Tinsdale Park
Bowron Lake Park
Betty Wendle Park
West Twin Park
Cariboo Mountains Park
Cariboo River Park
Likely
Horsefly
Quesnel Lake

Base Map Features:

Paved Road
Rough or Loose Road
Railway
Lake
Quesnel Forest District

Land Use:

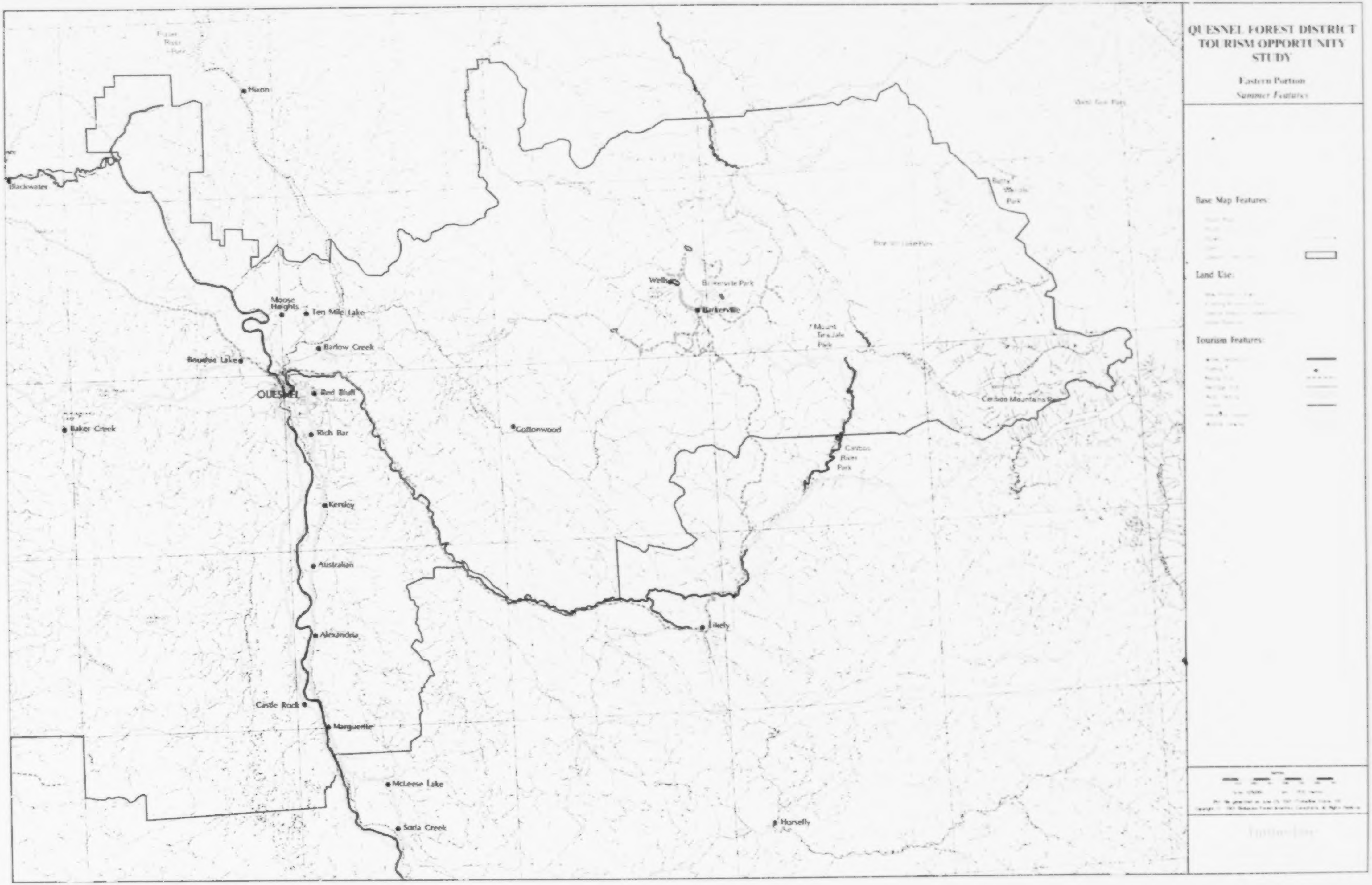
New Provincial Park
Existing Provincial Park
Special Resource Development Zone
Indian Reserves

Tourism Features:

Water Recreation
Fishing
Hiking Trail
Heritage Site
Auto Touring
Lodge
Industrial Tourism
Wildlife Viewing

Timberline

Forest Inventory Consultants


QUESNEL FOREST DISTRICT TOURISM OPPORTUNITY STUDY

Eastern Portion

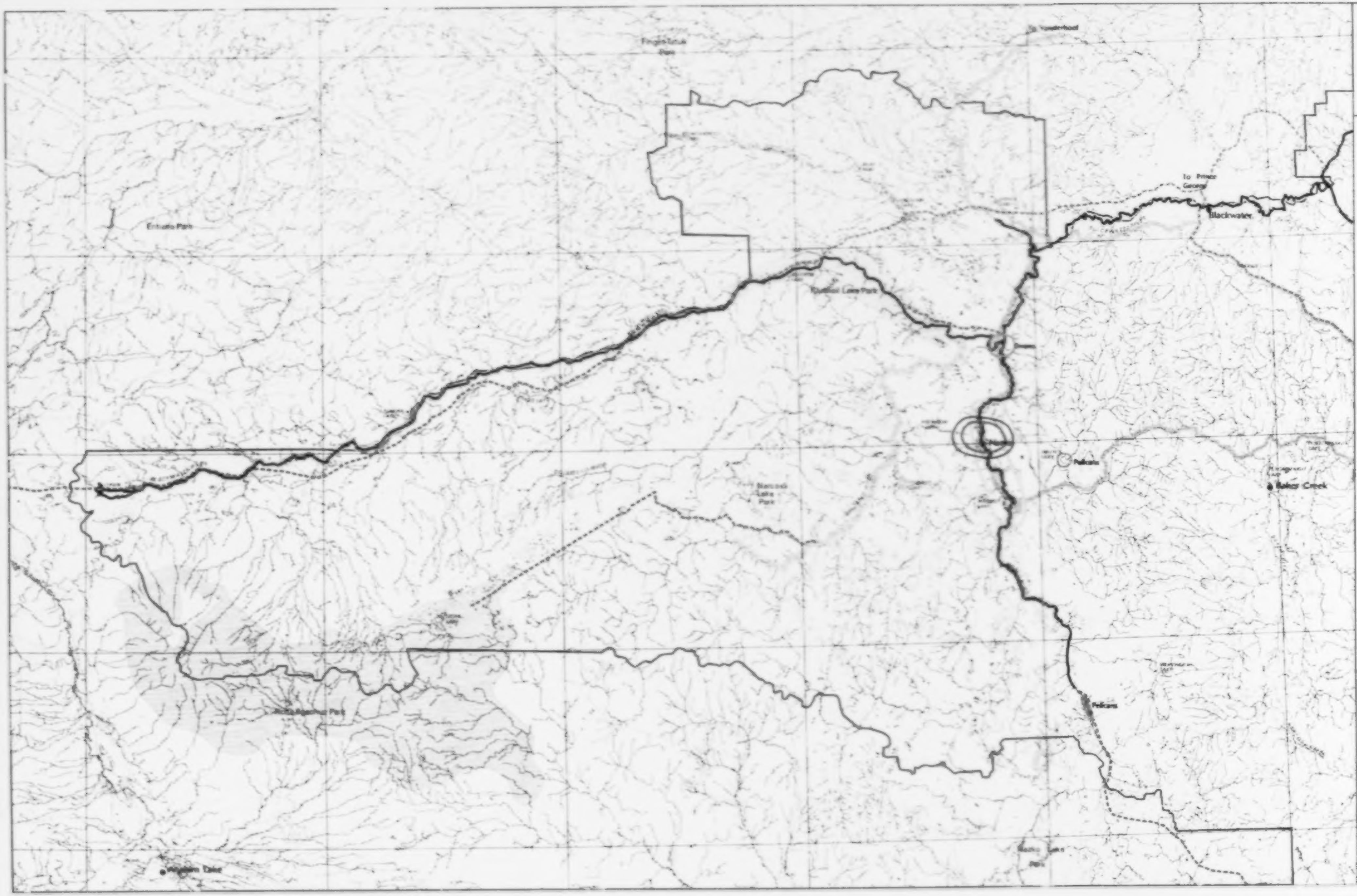
Summer Features

Base Map Features:
Land Use:
Tourism Features:
Hixon
Blackwater
Moose Heights
Ten Mile Lake
Barlow Creek
Bouchie Lake
QUESNEL
Red Bluff
Baker Creek
Rich Bar
Kersley
Australian
Alexandria
Castle Rock
Marguerite
McLeese Lake
Soda Creek
Cottonwood
Wells
Barkerville Park
Barkerville
Mount Tinsdale Park
Cariboo Mountains Park
Cariboo River Park
Likely
Horsefly
Bowron Lake Park

QUESNEL FOREST DISTRICT TOURISM OPPORTUNITY STUDY

Western Portion

Summer Features


To Vanderhoof
Finger-Tatuk Park
Entiako Park
To Prince George
Blackwater
Kluskoil Lake Park
Nazko Lake Park
Baker Creek
Itcha Ilgachuz Park
Anahim Lake
Base Map Features:
Paved Road
Rough or Loose Road
Railway
Lake
Quesnel Forest District
Land Use:
New Provincial Park
Existing Provincial Park
Special Resource Development Zone
Indian Reserves
Tourism Features:
Water Recreation
Fishing
Hiking Trail
Heritage Site
Auto Touring
Lodge
Industrial Tourism
Wildlife Viewing
Scale 1:250000 1 cm = 2500 metres

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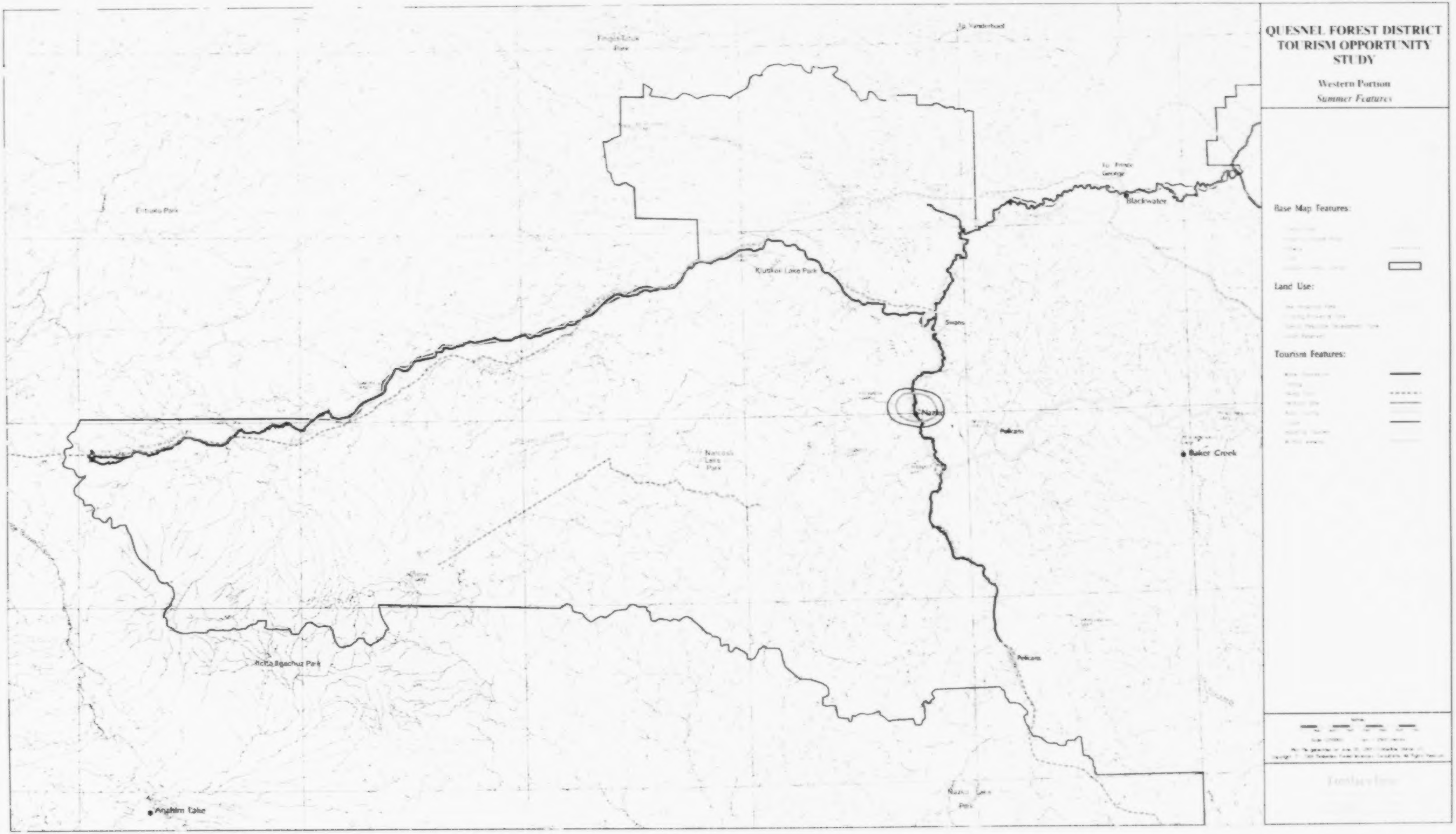
Timberline



QUESNEL FOREST DISTRICT TOURISM OPPORTUNITY STUDY

Western Portion

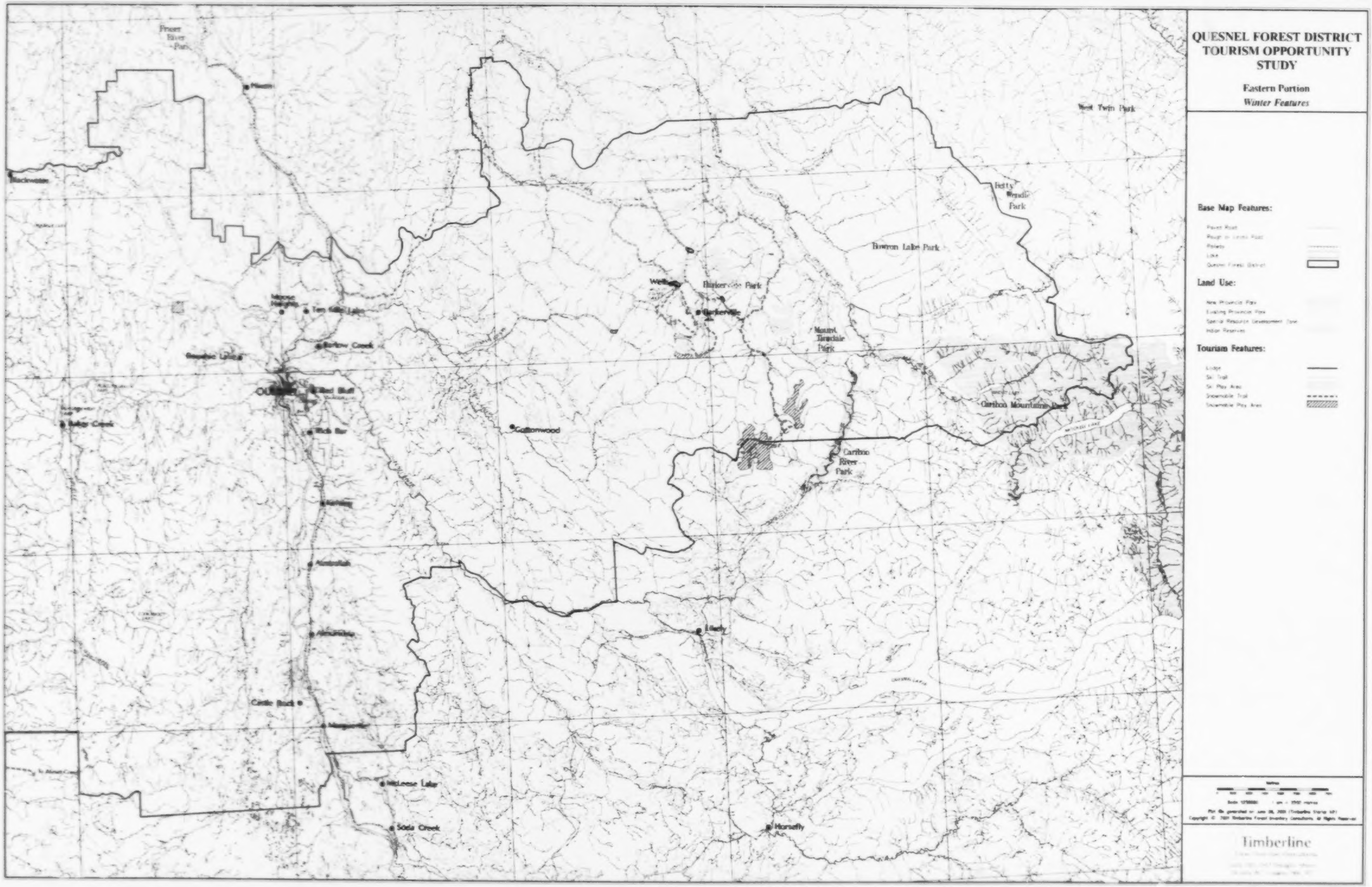
Summer Features

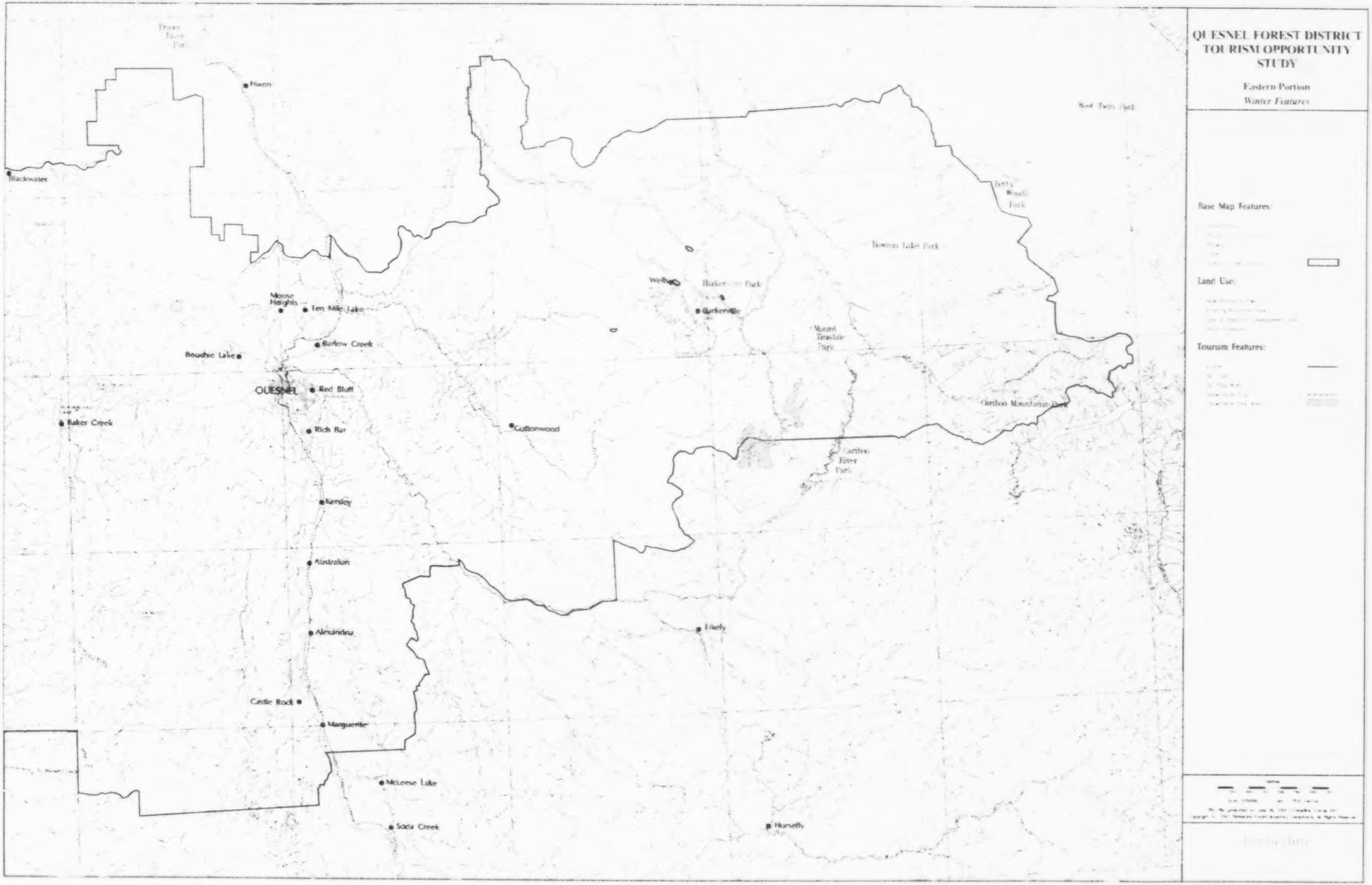
To Vanderhoof
Entiako Park
To Prince George
Blackwater
Kluskus Lake Park
Swans
Nazko
Pelicans
Nazco Lake Park
Baker Creek
Itcha Ilgachuz Park
Pelicans
Nazko Lake Park
Anahim Lake
Base Map Features:
Land Use:
Tourism Features:

QUESNEL FOREST DISTRICT TOURISM OPPORTUNITY STUDY

Eastern Portion

Winter Features


Fraser River Park
West Twin Park
Betty Wendle Park
Bowron Lake Park
Wells
Barkerville Park
Barkerville
Mount Tinsdale Park
Ten Mile Lake
Barlow Creek
Red Bluff
Baker Creek
Rich Bar
Cottonwood
Cariboo Mountains Park
Cariboo River Park
Castle Rock
Likely
McLeese Lake
Soda Creek
Horsefly
Base Map Features:
Paved Road
Rough or Limited Road
Railway
Lake
Quesnel Forest District
Land Use:
New Provincial Park
Existing Provincial Park
Special Resource Development Zone
Indian Reserves
Tourism Features:
Lodge
Ski Trail
Ski Play Area
Snowmobile Trail
Snowmobile Play Area
Timberline



QUESNEL FOREST DISTRICT TOURISM OPPORTUNITY STUDY

Eastern Portion

Winter Features

Base Map Features:
Land Use:
Tourism Features:
Fraser River Park
Hixon
Blackwater
West Twin Park
Moose Heights
Ten Mile Lake
Barlow Creek
Bouchie Lake
QUESNEL
Red Bluff
Baker Creek
Rich Bar
Cottonwood
Wells
Barkerville Park
Barkerville
Bowron Lake Park
Mount Tinsdale Park
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Alexandria
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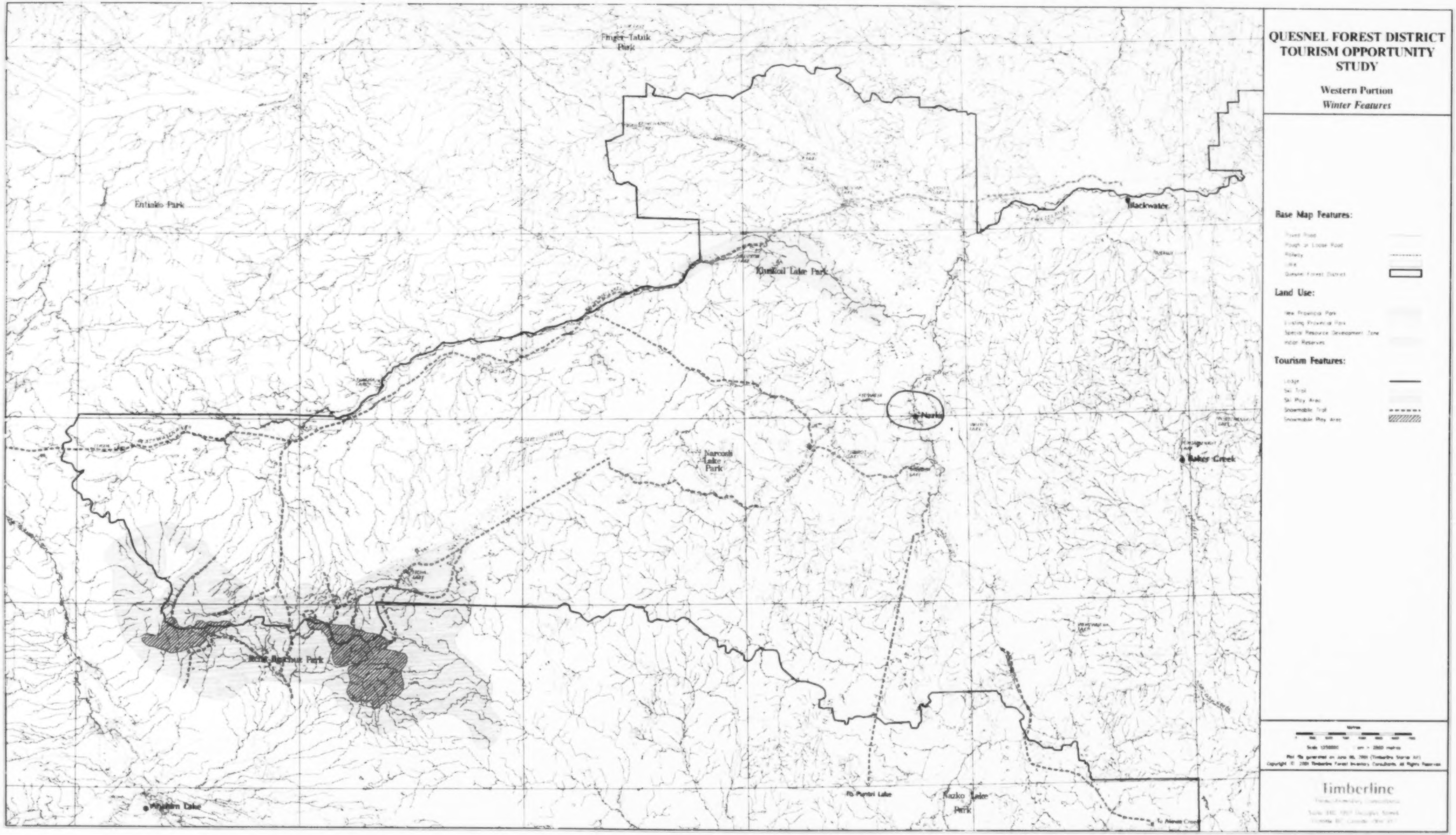
Castle Rock
Marguerite
McLeese Lake
Soda Creek
Horsefly



QUESNEL FOREST DISTRICT TOURISM OPPORTUNITY STUDY

Western Portion

Winter Features

Finger-Tatuk Park
Entiako Park
Kluskoil Lake Park
Blackwater
Nazko
Narcosli Lake Park
Baker Creek
Itcha Ilgachuz Park
Anahim Lake
To Puntzi Lake
Nazko Lake Park
To Alexis Creek
Base Map Features:
Paved Road
Rough or Loose Road
Railway
Lake
Quesnel Forest District
Land Use:
New Provincial Park
Existing Provincial Park
Special Resource Development Zone
Indian Reserves
Tourism Features:
Lodge
Ski Trail
Ski Play Area
Snowmobile Trail
Snowmobile Play Area
Metres
Scale 1:250000
1 cm = 2500 metres

Plot file generated on June 06, 2001 (Timberline Starter Kit)

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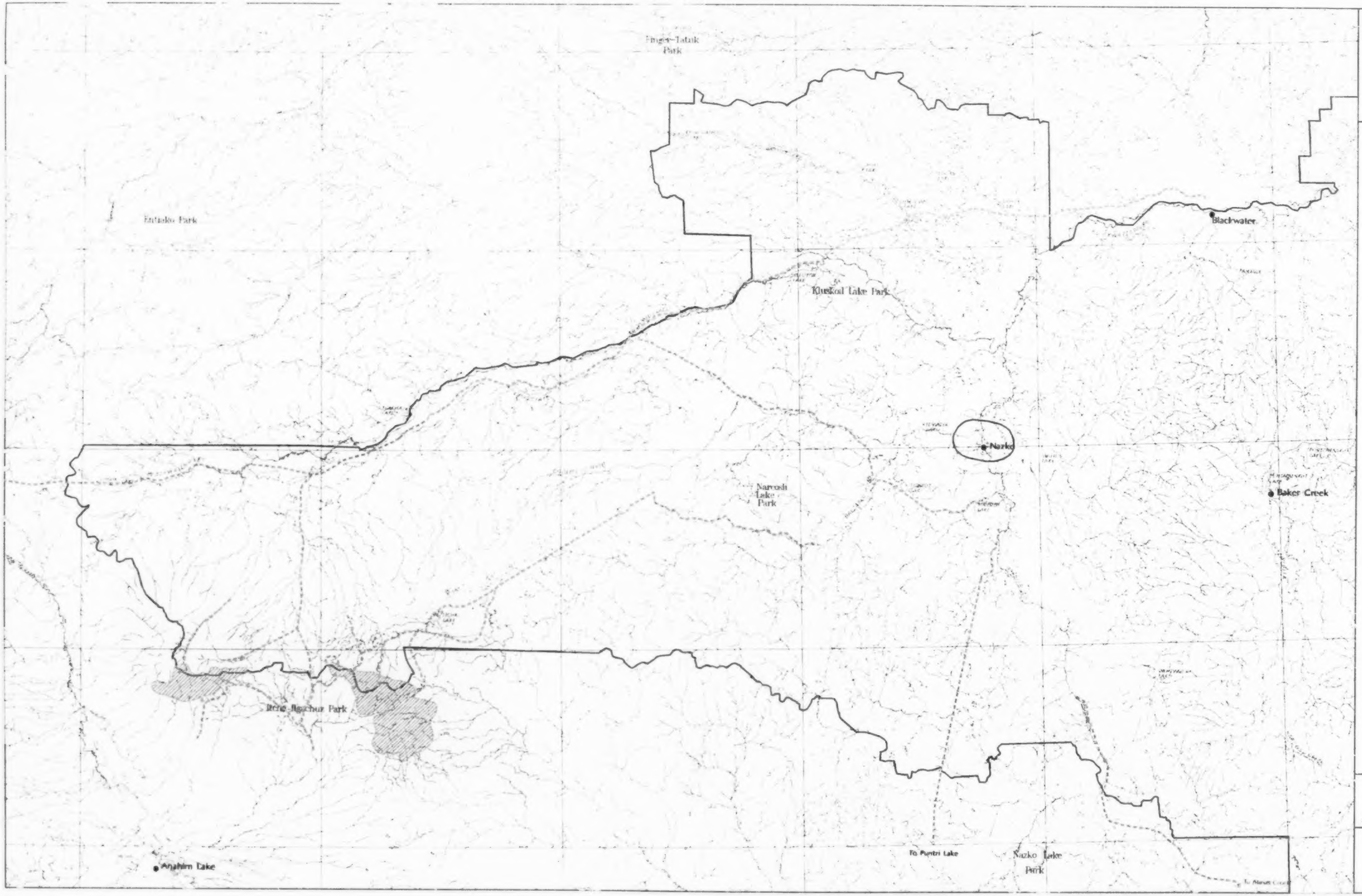
QUESNEL FOREST DISTRICT TOURISM OPPORTUNITY STUDY

Western Portion

Winter Features


Finger-Tatuk Park
Entiako Park
Kluskoil Lake Park
Blackwater
Nazko
Narcosli Lake Park
Baker Creek
Itcha Ilgachuz Park
Anahim Lake
To Puntzi Lake
Nazko Lake Park
To Alexis Creek

Base Map Features:

Paved Road
Rough or Loose Road
Railway
Lake
Quesnel Forest District

Land Use:

New Provincial Park
Existing Provincial Park
Special Resource Development Zone
Indian Reserves

Tourism Features:

Lodge
Ski Trail
Ski Play Area
Snowmobile Trail
Snowmobile Play Area

Metres

Scale 1:250000 1 cm = 2500 metres

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